COMPATIBILITY REVIEW SYSTEM 2.0

User's Guide

Document Change History

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1.0	8/31/07	Robert Freimuth	Approved by developer and D&T WS
1.1	12/13/07	Robert Freimuth	Updated links
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Table of Contents

Chapter 1: Introduction to the Manual

This chapter outlines the structure and organization of this User's Guide.

The following topics are covered in this chapter:

Who should read this guide
Organization of the User's Guide
Document text conventions

1.1 Who Should Read This Guide

This User's Guide is intended to be read by users of the Compatibility Review System. This includes people in the following categories:

1. Mentors from the VCDE or Architecture workspaces
2. Compatibility Reviewers from the VCDE or Architecture workspaces
3. Developers that will submit a model for Silver level review
4. Leads from workspaces that are funding application development
5. Members of NCICB that load UML models into the caDSR or curate CDEs
6. Administrators of the CRS

1.2 Organization of the User's Guide

This User's Guide is divided into five main sections:

Overview	Overview of the CRS
Administrative Tasks	Managing users, workspaces, checklists, etc
Reviewing a Model	Initiating, performing, and concluding a review
Troubleshooting	Error messages and FAQs
Reference Material	References and Abbreviations

Chapter	Description
Overview	
1 Introduction to the Manual	Brief introduction to the organization of the manual
2 Getting Started	Overview of features and user interface, requesting a new account, logging on/off
3 User Roles and Workflows	Types of roles in the CRS, overview of typical workflows
Administrative Tasks	
4 Managing Users	Management of user accounts, viewing other user profiles
5 Managing Workspaces	Administrative management of workspaces
6 Managing Checklists	Administrative management of checklist groups, checklists, grades, and references for checklist items

7	Managing Projects	Administrative management of review projects and submission package file lists
8	Managing Reports	Administrative management of report templates
Reviewing a Model		
9	Initiating a Review	Submitting a model for loading, requesting reviews, initiating projects, reviewing the submission package, workspace approval, task assignment
10	Performing a Review	Reviewing the model, submitting comments
11	Concluding a Review	Generating reports, uploading and downloading files
Troubleshooting		
12	Error Messages and Problem Resolutions	Error diagnosis, troubleshooting, contact information, and known issues
13	FAQs	Frequently Asked Questions
Reference Material		
	References	Supporting documentation
	Abbreviations and Acronyms	List of abbreviations and acronyms used in this text

1.3 Document Text Conventions

The following table shows various typefaces to differentiate between regular text and menu commands, keyboard keys, and text that you type. This illustrates how conventions are represented in this guide.

Convention	Description	Example
Bold & Capitalized Command Capitalized command > Capitalized command	Indicates a Menu command Indicates Sequential Menu commands	**Admin > Refresh**
TEXT IN SMALL CAPS	Keyboard key that you press	Press ENTER.
TEXT IN SMALL CAPS + TEXT IN SMALL CAPS	Keyboard keys that you press simultaneously	Press SHIFT + CTRL and then release both.
Boldface type	Options that you select in dialog boxes or drop-down menus. Buttons or icons that you click.	In the **Open** dialog box, select the file and click the **Open** button.
Italics	Used to reference other documents, sections, figures, and tables.	*caCORE Software Development Kit 1.0 Programmer's Guide*
Italic boldface type	Text that you type	In the New Subset text box, enter ***Proprietary Proteins***.

`Courier typestyle`	Used for filenames, directory names, commands, file listings, source code examples and anything that would appear in a program, such as methods, variables, and classes.	`URL_definition ::= url_string`
Note:	Highlights a concept of particular interest	**Note:** This concept is used throughout the installation manual.
Warning!	Highlights information of which you should be particularly aware.	**Warning!** Deleting an object will permanently delete it from the database.
{ }	Curly brackets are used for replaceable items.	Replace {root directory} with its proper value such as `c:\cabio`

Table 1.1 Document Conventions

Chapter 2: Getting Started

This chapter provides an overview of the Compatibility Review System.

The following topics are covered in this chapter:

2.1 Overview of the CRS

The VCDE and Architecture workspaces are charged with performing compatibility reviews to help ensure developer projects interoperate when they are registered on caGrid. Object models are expected to meet certain guidelines, set forth in *caBIG™ Compatibility Guidelines, Revision 2* (dated July 7, 2005). Members of the VCDE and Architecture workspaces have established checklists based on that document and a process by which compatibility reviews can take place.

To qualify for Silver level compatibility a model must meet many criteria. Some of those criteria are prerequisites for loading a model into the caDSR and/or using the caCORE SDK, and the criteria can be verified computationally using tools such as the UML loader and the SIW. Many criteria, however, must be reviewed manually.

One of the lessons learned from the initial VCDE compatibility reviews is that the current review process will not be able to keep up with demand as more and more developers submit their object models for compatibility reviews.

The current review process requires an extensive amount of administrative work, including gathering documents, navigating to web pages, identifying specific data elements within the documentation, integrating comments from the review team into a cohesive document, and preparing the final report to the workspace. This work is necessary to perform the review but it adds virtually nothing to its content and can account for more than 50% of the overall time spent on the review. Therefore, the current review process is not scalable.

The CRS is a web-based system designed to reduce the amount of time VCDE reviewers spend on administrative work and allow them to spend time on the important task of ensuring that models meet the established guidelines and contain the most accurate semantic annotations as possible. While tools such as the Semantic Integration Workbench (SIW) and the CDE Browser are continually adding features, they are being developed for a different purpose. The CRS leverages existing tools but is specifically designed to facilitate the review process.

2.2 Features and Functions

Version 1.0 of the Compatibility Review System focused on the VCDE Silver level review workflows. Version 2.0 added support for Architecture Silver level reviews and a workflow for submitting a model for loading into the caDSR. CRS 2.0 also included improved review project management and streamlined review interfaces.

The CRS includes the following features and functions:

- Administrative Functions
  - User and account management
  - Workspace management
  - Checklist management
    - Checklist grouping
    - Checklist items
    - Granularity
    - Grading
    - References
    - Checklist versions
  - Submission package management

- Review Module
  - Requesting a review
    - Submission package assembly
  - Administrative process
    - Creating projects
    - Getting workspace approval
    - Assembling the review team
  - Reviewing the model (Architecture and VCDE)
    - Reviewing the submission package
    - Assigning review tasks
    - Reviewing the model
    - Storing and submitting comments

- UML Loading
  - Submission package assembly
  - Archiving annotated XMI files

- File Handling and Report Generation
  - Upload and download files associated with the review
  - Report generation at any point during the review
  - Overview report
  - Detail report
  - CDE reuse report

2.3 Requesting a New Account

Use a web browser such as Internet Explorer or Mozilla Firefox to navigate to the CRS home page. The URL of the home page is http://cabigcrs.wustl.edu:8080/crs/ (hosted at Washington University). A list of the supported browsers (and the versions that have been tested) is on the CRS home page.

Note: As the CRS is a web-based system, local installation of the application is not required. Furthermore, the URL given above can be used to access the single instance of the CRS that is used for compatibility reviews performed by members of caBIG™. When certified third-party providers are licensed to perform compatibility reviews they may use a local installation for their private use.

An account is required to access the CRS. If you are a new user and do not yet have an account, click the **Request an Account** link (Figure 2.1) to open the **Request an Account** form.

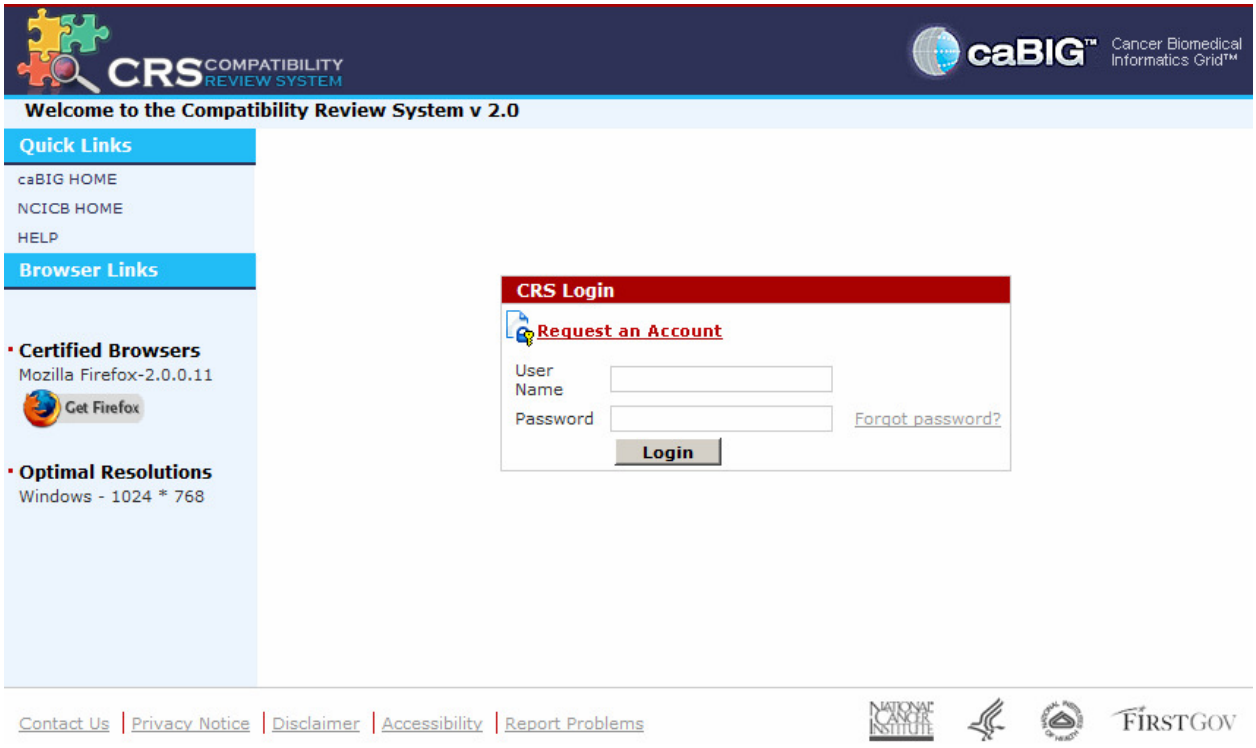


Figure 2.1: CRS home page and link to request a new account

Enter your information into the **Request an Account** form (Figure 2.2). The required fields (which are indicated by asterisks) include your preferred login name and contact information. The form also includes text boxes where you can enter your areas of expertise (which will be included in your user profile) and the reason you are requesting an account on the system.

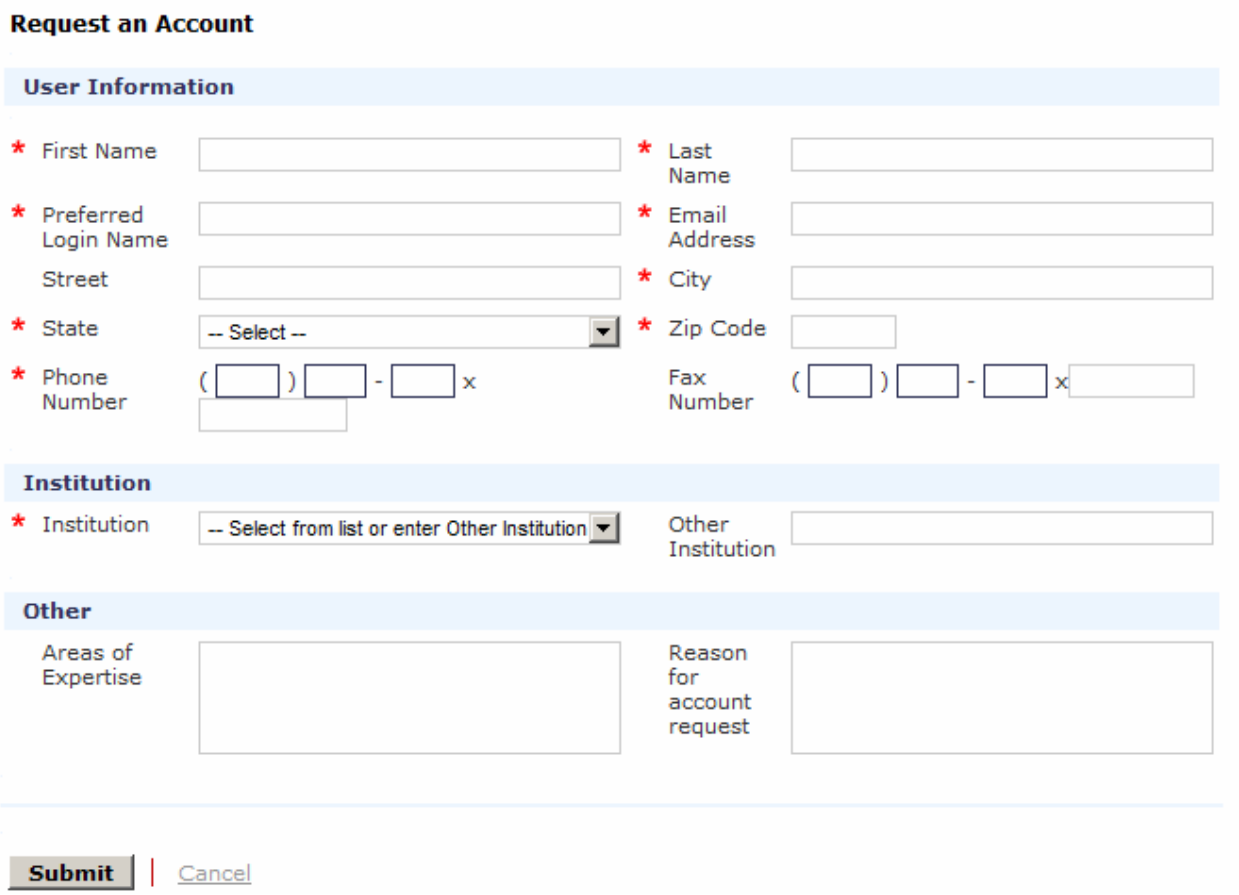


Figure 2.2: Request an Account form

Click the **Submit** button. Your account request will be reviewed by an administrator and an email will be sent to the address that you provided. If your account is approved, the email will include a temporary password that you can use to log into the system.

2.4 Logging On and Off

Use a web browser such as Internet Explorer or Mozilla Firefox to navigate to the CRS home page (Figure 2.3). The URL of the home page is http://cabigcrs.wustl.edu:8080/crs/. A list of the supported browsers (and the versions that have been tested) is on the CRS home page.

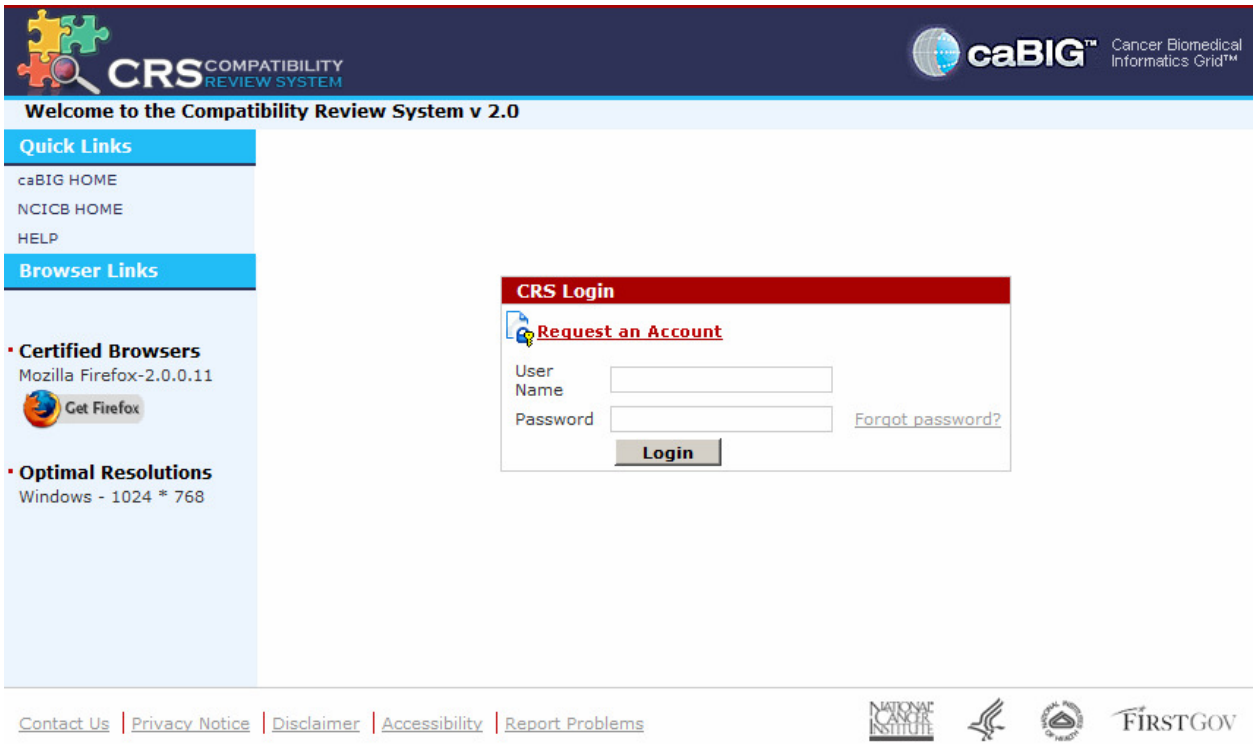


Figure 2.3: CRS home page

An account is required to access the CRS. If you do not have an account, see Requesting a New Account. If you are a registered user, enter your user name and password and click the **Login** button.

If you are logging in for the first time, you will be prompted to change your password (Figure 2.4). Enter your old password and your new password (twice), then click the **Submit** button.

Note: Your new password must contain at least one uppercase letter, at least one lowercase letter, and at least one digit. Spaces are not allowed.

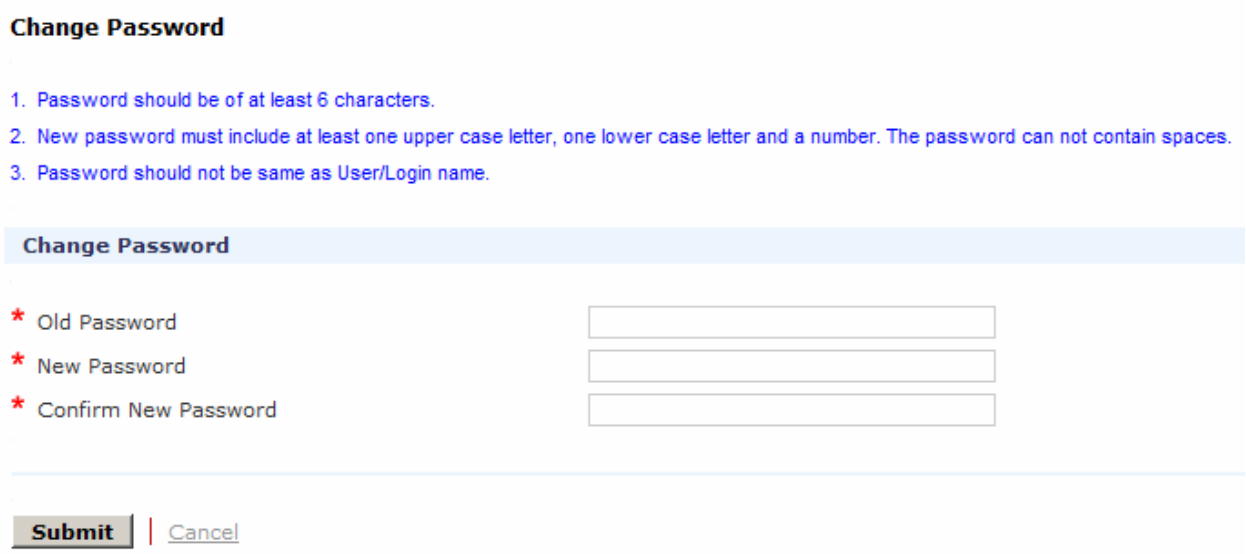


Figure 2.4: Change password form

If you are a registered user and do not remember your password, click the **Forgot Password?** link on the CRS home page (Figure 2.3) to access the **Forgot Password** form (Figure 2.5). Enter your user name and the email address that is registered to your account and click the **Send** button. Your password will be reset and you will receive an email that contains a temporary password that must be changed the next time you log in (Figure 2.4). If the email address that is entered does not match the one on the account an error message will be displayed.

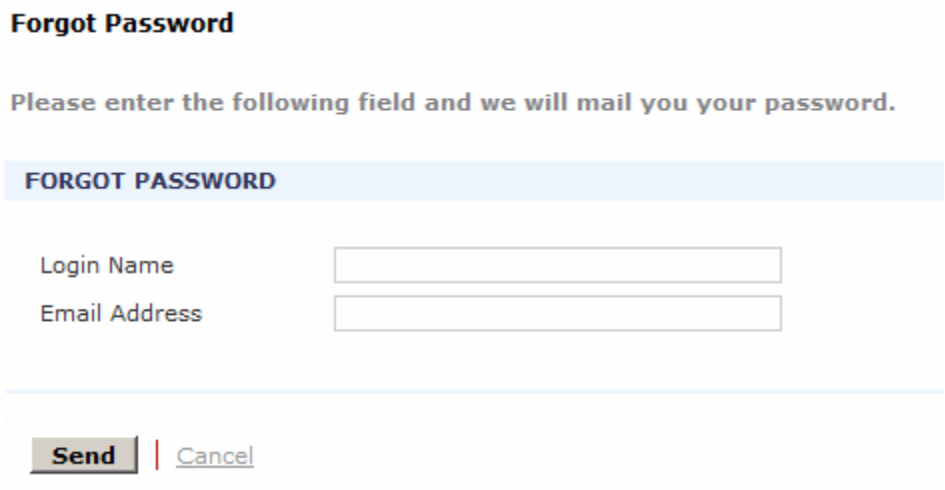


Figure 2.5: Forgot password form

To log off, click the **Sign Out** link located on the right-hand side of the top banner (Figure 2.6).

Figure 2.6: Sign Out link, located on the top banner

2.5 Understanding the User Interface

The CRS is a web application, and as such should be accessed using a web browser. The application contains many standard web features, including links, buttons, tables, and forms, and therefore users that are already familiar with web browsing should find the user interface to be reasonably intuitive.

There are four main sections of the user interface (Figure 2.7):

1. Main content frame
2. Navigation bar/menu
3. Top banner (header)
4. Bottom banner (footer)

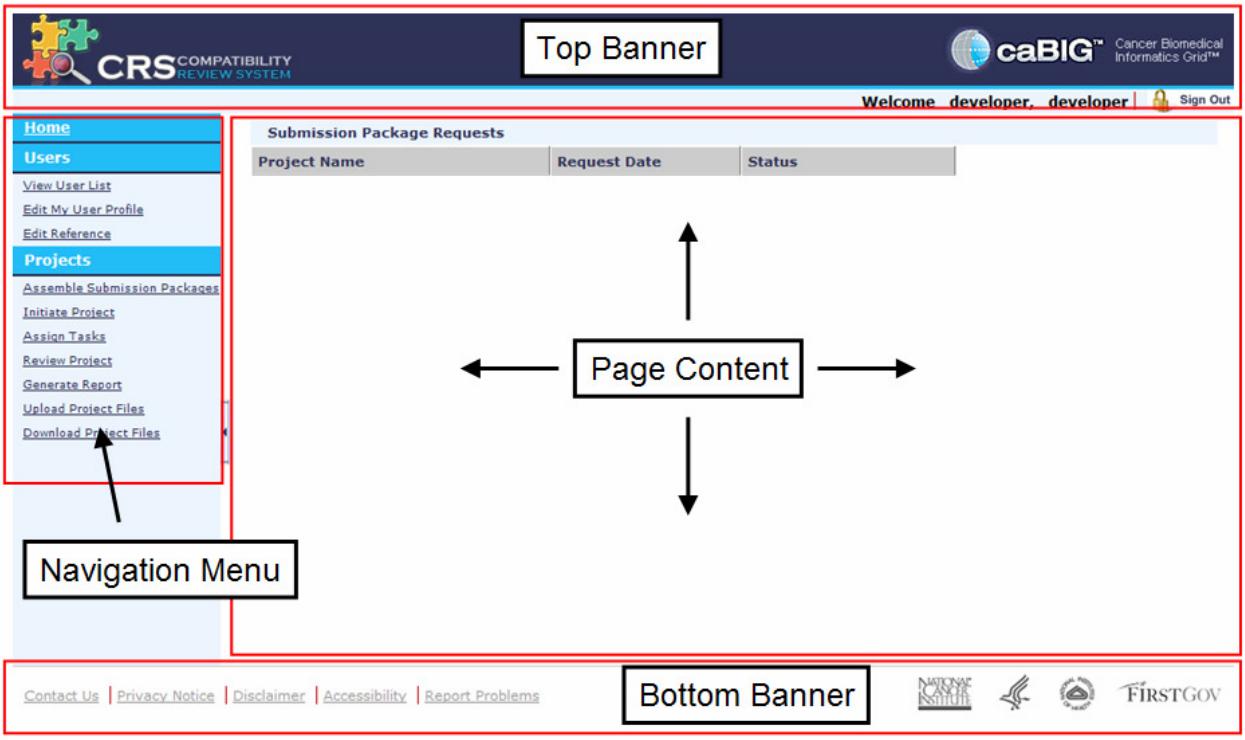


Figure 2.7: User interface

The main content frame contains the content of the current page, which may include text, tables, and/or graphics. The navigation menu contains a categorized list of pages that are accessible given the user's system privileges (administrators have access to more pages than reviewers, for example). The top banner lists the user's name and a link to log out of the system. The bottom banner contains links to general site documentation. Links to related governmental web pages are included in the top and bottom banners.

The navigation manu provides quick access to common pages and workflows. Some pages may contain wide tables that require horizontal scrolling. To enlarge the main content frame and to reduce the amount of horizontal scrolling required, the navigation menu can be hidden by clicking on the arrow located on the divider between the navigation menu and the main content frame (Figure 2.8). The arrow can be clicked again to expand the navigation menu.

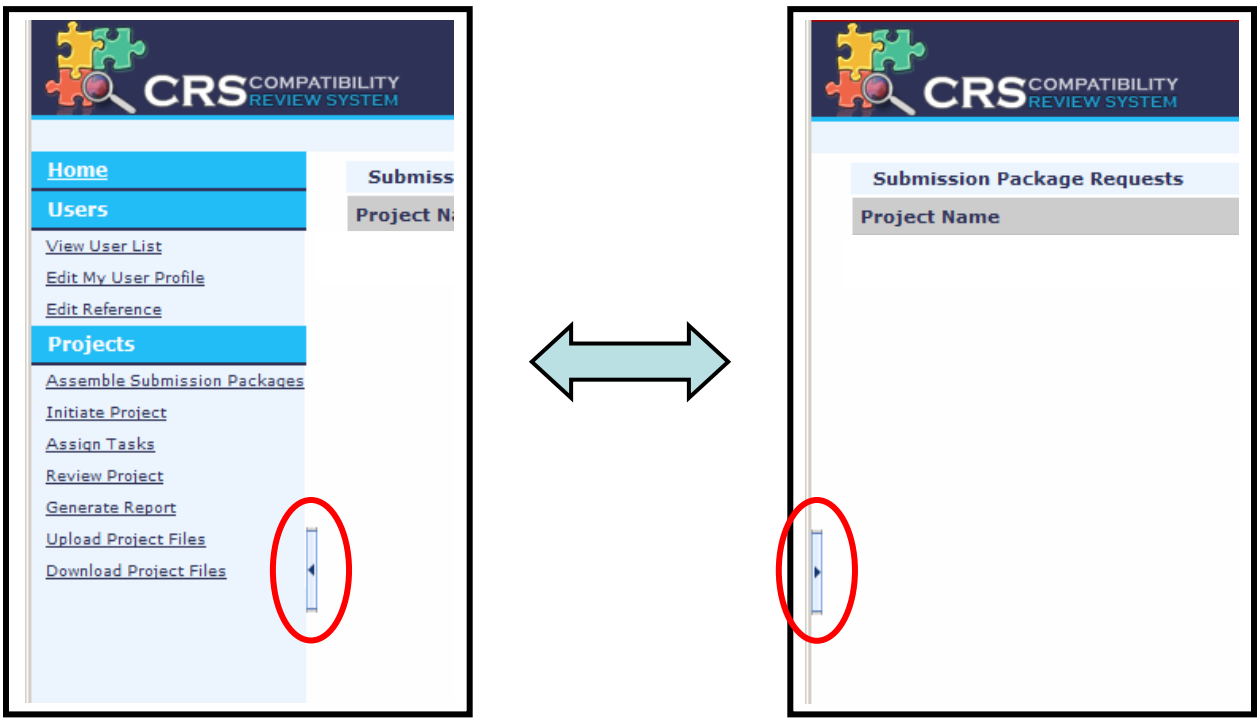


Figure 2.8: Hiding and unhiding the navigation bar

The tables on many of the pages contain additional functionality beyond simply displaying data. Specifically, the columns in the table may be resized by clicking and dragging the divider between column headers (Figure 2.9). In addition, the data within the table can be sorted by a given column by clicking the header of that column (Figure 2.10). Clicking the column header again will toggle between ascending and descending sorting. Finally, double clicking a record (row) in most tables will open a new page that contains additional detail about that record.

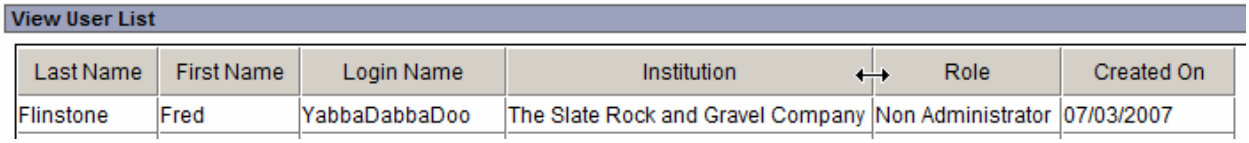


Figure 2.9: Resizing columns in a table

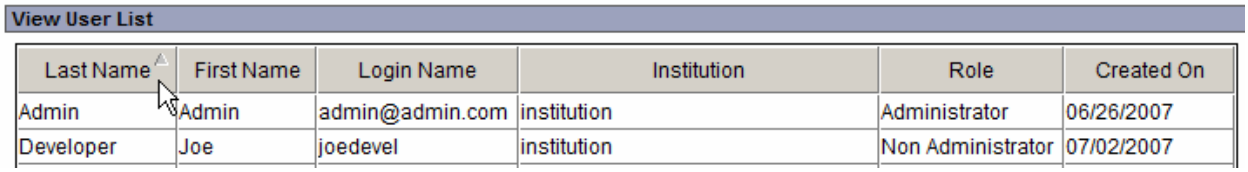


Figure 2.10: Sorting rows in a table

Chapter 3: User Roles and Workflows

This chapter reviews the types of roles that are assigned to users of the CRS and provides an overview of common workflows.

The following topics are covered in this chapter:

User Roles
Workflows

3.1 User Roles

The CRS supports several different types of workflows, each of which involve one or more different types of users:

- **Reviewers**, **Lead Reviewers**, and **Project Leads** from the VCDE or Architecture workspaces
- **Developers** submit models for loading and for compatibility reviews
- **Workspace leads** fund application development
- **caDSR team** members load models into the caDSR and curate them
- **Administrators** maintain the CRS

Each user account has two settings that determine which pages are accessible and whether or not review tasks can be assigned to the user. Those privileges are defined below:

- **Active Reviewer** status is granted to most users of the system; however, some users (such as Workspace leads) are not listed as active reviewers and can not be assigned tasks during a review
- **Administrator** privileges are granted to a select group of users and allow access to pages that assist in maintaining the CRS, user accounts, review projects, etc

Table 3.1 summarizes this information.

Role	***Actor***	***Description***
Admin	Administrator	• User provisioning and privilege assignment • Accepts submission packages from developers • Assigns the lead reviewer and review team members • Creates and updates submission package requirements, review checklists, and grading scheme • Has access to the admin pages for user and project management

Non-Admin	Developer	• Submits projects for loading into the caDSR • Submits projects for review • Has access to only the pages for submitting projects for review and performing a self-review
	Project Lead	• Oversees the review • Creates and submits the round-trip XMI file • Generates and uploads reports
	Lead Reviewer	• Initiates and archives review projects • Assigns tasks to review team members • Creates and uploads the final review reports • Has access to the review pages to assign tasks and conduct the review
	Review team member	• Performs tasks assigned by the lead reviewer • Has access to only the review pages
	Workspace lead	• Approves developer requests for reviews • Has access to only the review approval page
	caDSR team member	• Loads submitted models into the caDSR • Curates models in the caDSR

Table 3.1 Summary of user roles

3.2 Workflows

The CRS supports two main workflows: the UML loading workflow and the compatibility review workflow. The UML loading workflow is primarily used by **Developers** to submit UML models to the **caDSR Team** for loading onto the caDSR. A simplified view of the UML loading workflow is shown in Figure 3.1.

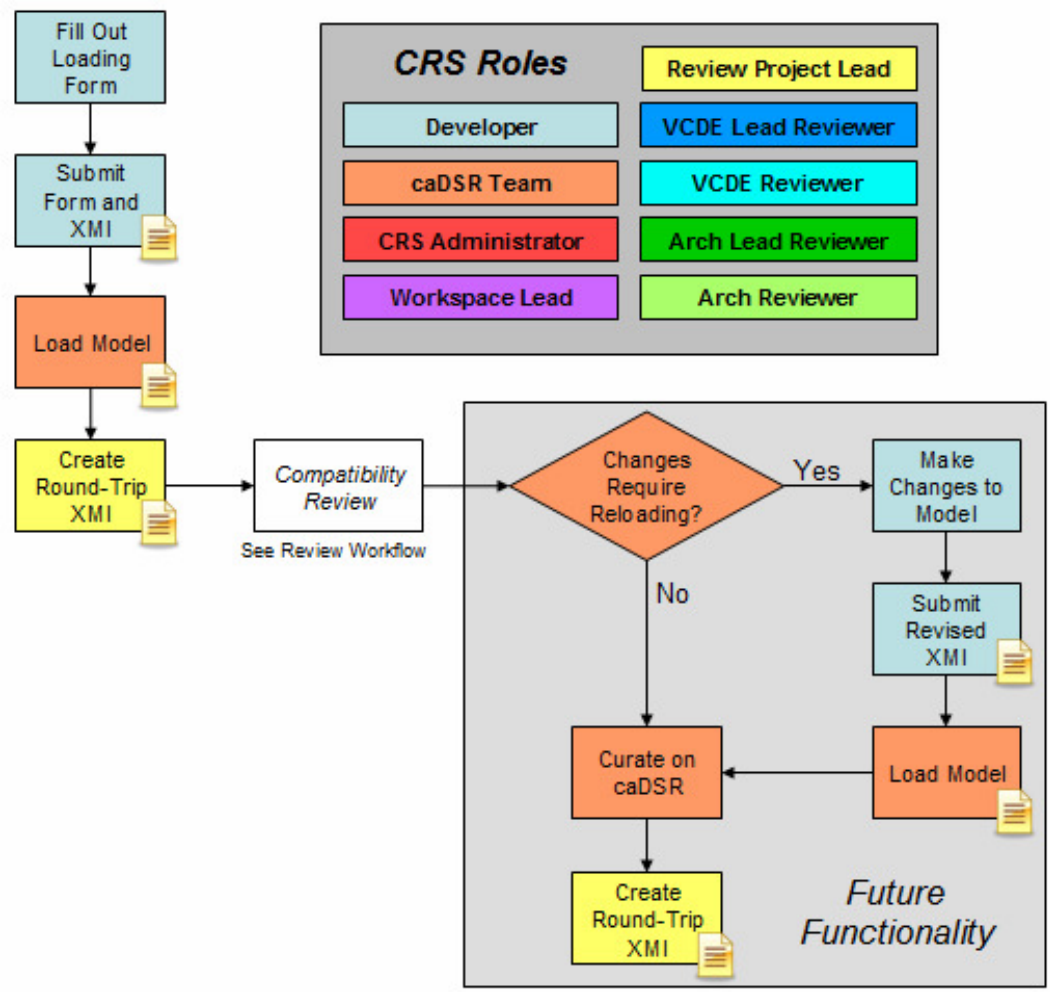


Figure 3.1: UML loading workflow

The review workflow is primarily used by **Developers** and members of the review team to perform the compatibility review. There are five main phases in the review workflow:

1. Assembling the submission package
2. Creating the review project
3. Initiating the review project
4. Performing the review
5. Concluding the review

The main steps in each phase of the review workflow are shown in Figure 3.2 and Figure 3.3.

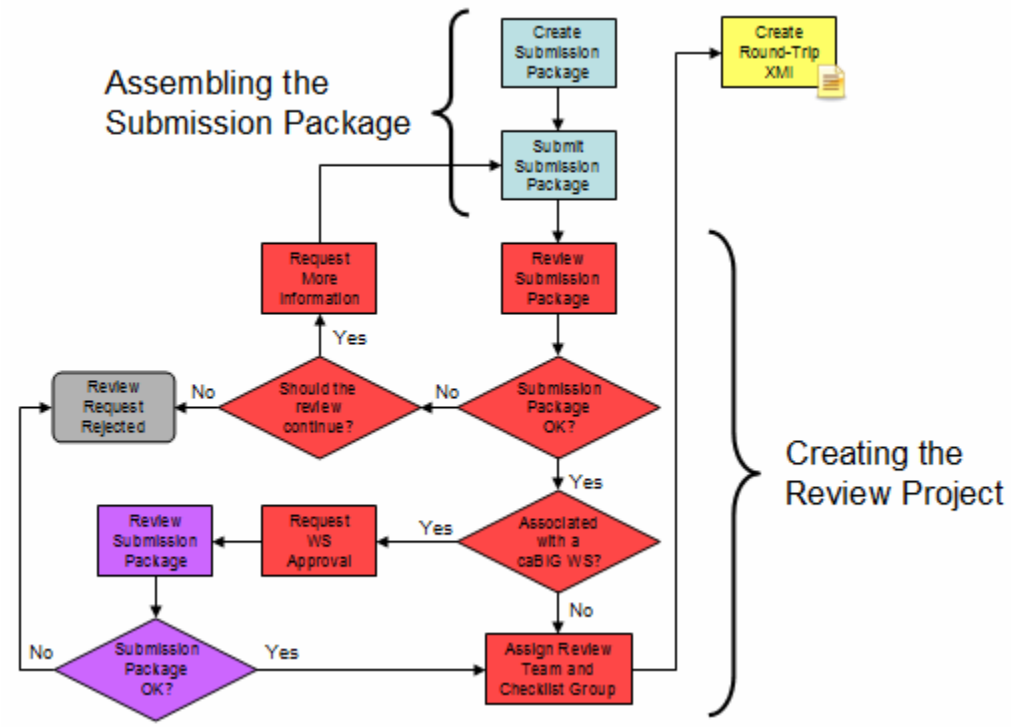


Figure 3.2: Review workflow – assembling the submission package, creating the review project

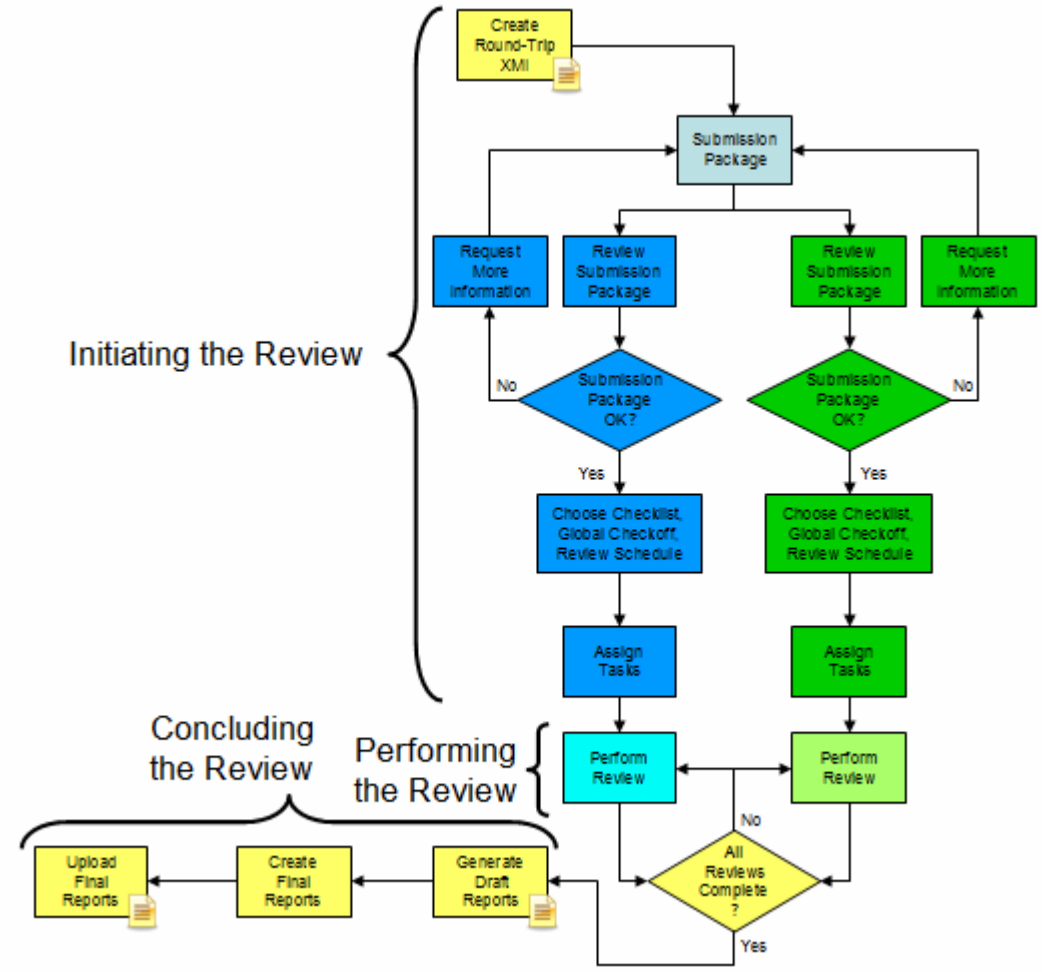


Figure 3.3: Review workflow – initiating, performing, and concluding the review

Each step is described in detail in Chapters 9-11.

Chapter 4: Managing Users

This chapter reviews the tasks associated with managing user accounts.

The following topics are covered in this chapter:

Creating New User Accounts
Approving New User Accounts
Viewing User Profiles
Editing User Profiles

4.1 Creating New User Accounts

New user accounts can be created two different ways. Most often a user will fill out and submit the **Request an Account** form (see Requesting a New Account), but an **Administrator** also has the ability to create an account directly.

1. Click the **Create User** link located in the **Users** section of the navigation bar. This loads the **Add User** form (Figure 4.1).

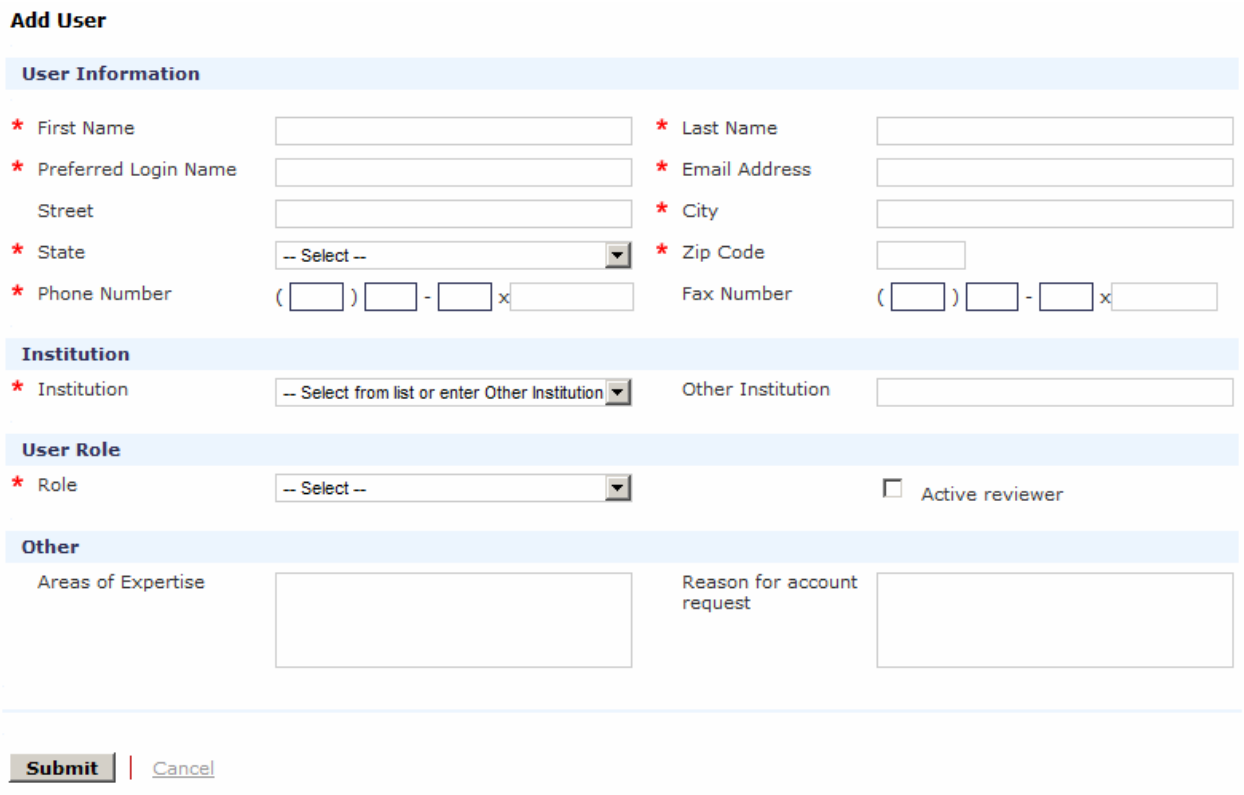


Figure 4.1: Administrator's Add User form

2. Fill out the **Add User** form with the information for the new account. This includes selecting a role for the user (**Administrator** or **Non-Administrator**) and using the check box to indicate whether or not the new user should be listed as an **Active Reviewer**.

   Note: Asterisks (*) indicate required fields.

3. Click the **Submit** button. If the account was created successfully, a message will be displayed ("User successfully created for lastname, firstname") and an email will be sent to the address provided that contains login information. If incomplete or invalid data was entered, an error message will be displayed and the form will be reloaded for editing.

4.2 Approving New User Accounts

After a new user fills out and submits the **Request an Account** form (see Requesting a New Account), the request must be approved by an **Administrator** before the account is created on the system and the user can log in.

1. Click the **Approve New Users** link located in the **Users** section of the navigation bar. This loads the **Pending Account Requests** page (Figure 4.2), which lists all of the account requests for new accounts that have not yet been approved or denied by an **Administrator**. If no account requests are pending, the system displays the message "No account requests are pending approval".

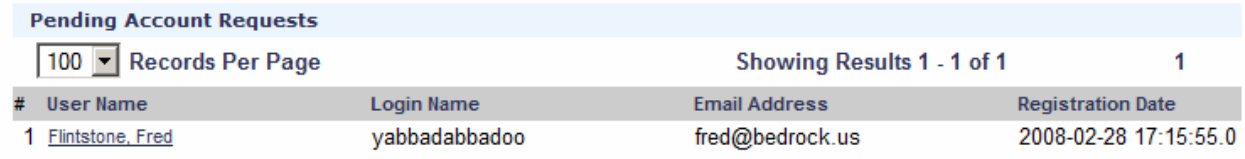


Figure 4.2: Pending Account Requests page

The bar above the table contains a drop-down menu that controls how many records are displayed on each page. The options in the drop-down menu are **10**, **20**, **30**, **40**, **100**, or **All**.

Each record in the table lists the real name of the person requesting the account, their preferred login name, their email address, and the date and time they submitted the request.

2. Click on the real name of the user (in the **User Name** column), which is a link. This opens the **Account Request Details** page (Figure 4.3), which displays the registration information that was submitted on the **Request an Account** form.

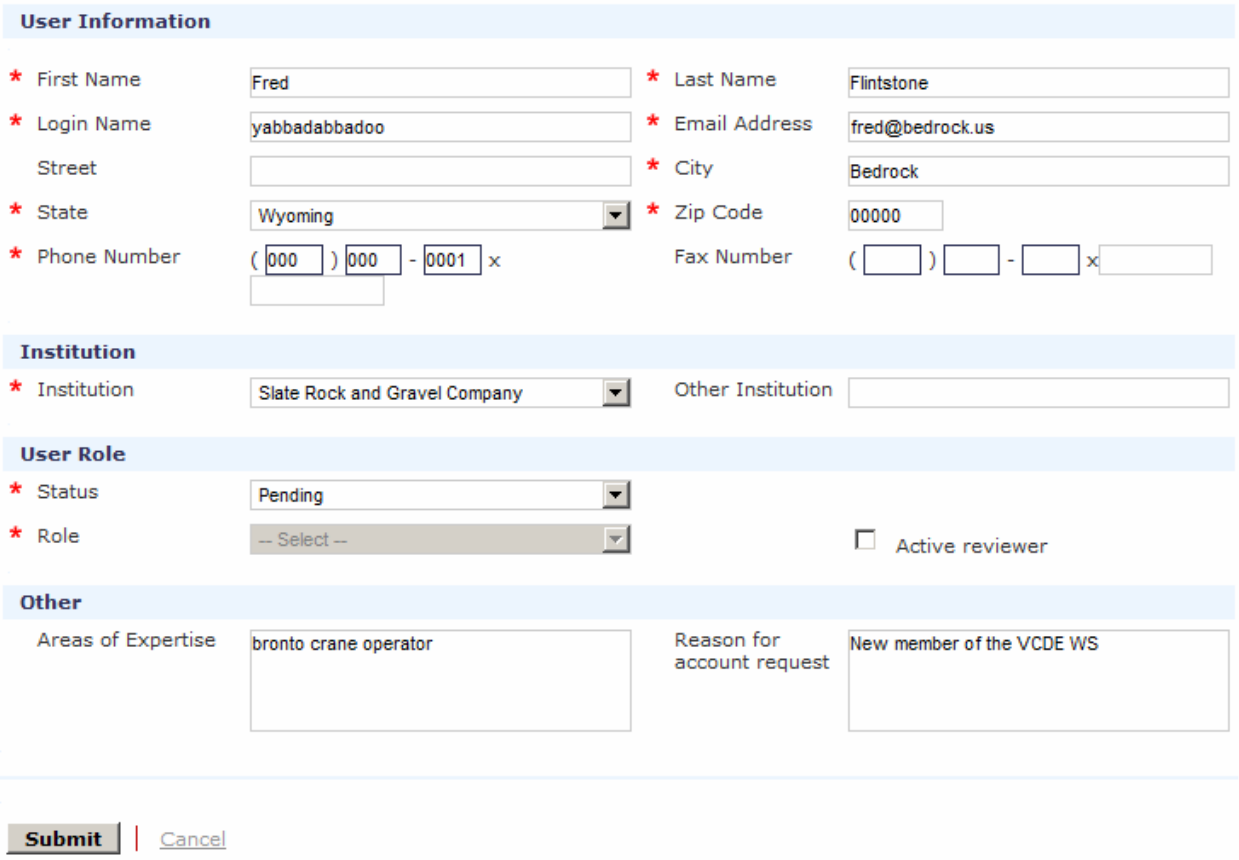


Figure 4.3: Account Request Details page

3. Review the information. All fields are editable and may be changed as needed.
4. **Approve** or **Reject** the account request by selecting the appropriate option from the **Status** drop-down menu.
    a. If **Approve** is selected, the **Role** drop-down menu is activated and a role (**Administrator** or **Non-Administrator**) can be assigned to the account. Set the **Active Reviewer** check box as desired.
    b. If **Reject** is selected, no additional settings are necessary.
5. Click the **Submit** button.
    a. If the account was approved and successfully created a message is displayed and the **Edit Profile** page is displayed. An email is sent to the user that informs them that their account request was approved and provides them with login information.
    b. If the account was rejected, an email is sent to the user that informs them that their account request was denied.

4.3 Viewing User Profiles

All users can view a list of the registered users on the CRS and each user's profile, including contact information and areas of expertise.

1. Click the **View User List** link located in the **Users** section of the navigation bar. This loads the **User List** page (Figure 4.4), which contains a table of basic information about each user that is registered on the system, including their real name, login name, institution, role, and the date their account was created.

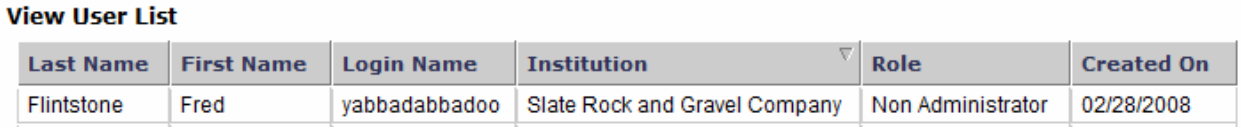


Figure 4.4: The user list table

2. Double-click a row in the table to view the complete profile for that user (Figure 4.5). If you are an **Administrator** there will be a link above the table that will allow you to edit the user's profile (see Editing User Profiles).

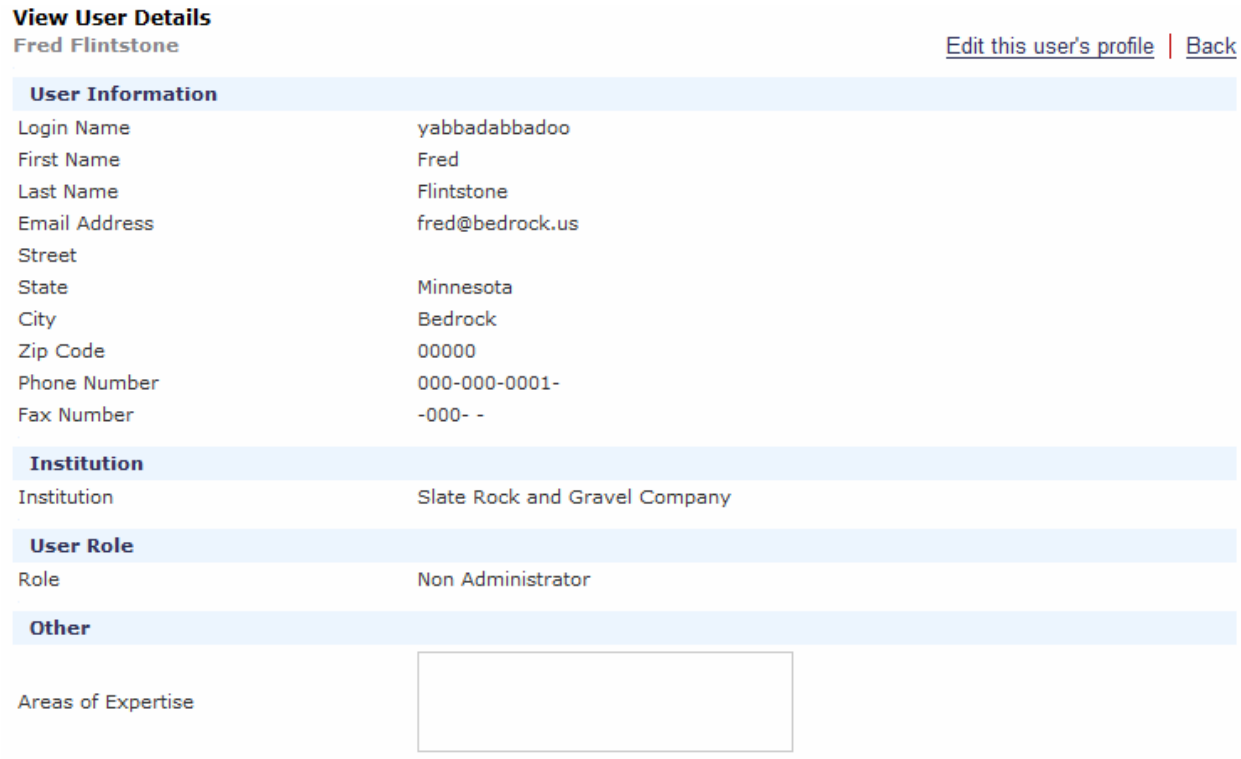


Figure 4.5: Viewing a user's profile

4.4 Editing User Profiles

You can edit your user profile to ensure all of the information is up-to-date.

1. Click the **Edit My User Profile** link located in the **Users** section of the navigation bar. This loads the **Edit Profile** page (Figure 4.6).

Note: Administrators can edit any user's profile by following the link on the **User Details** page (see Viewing User Profiles).

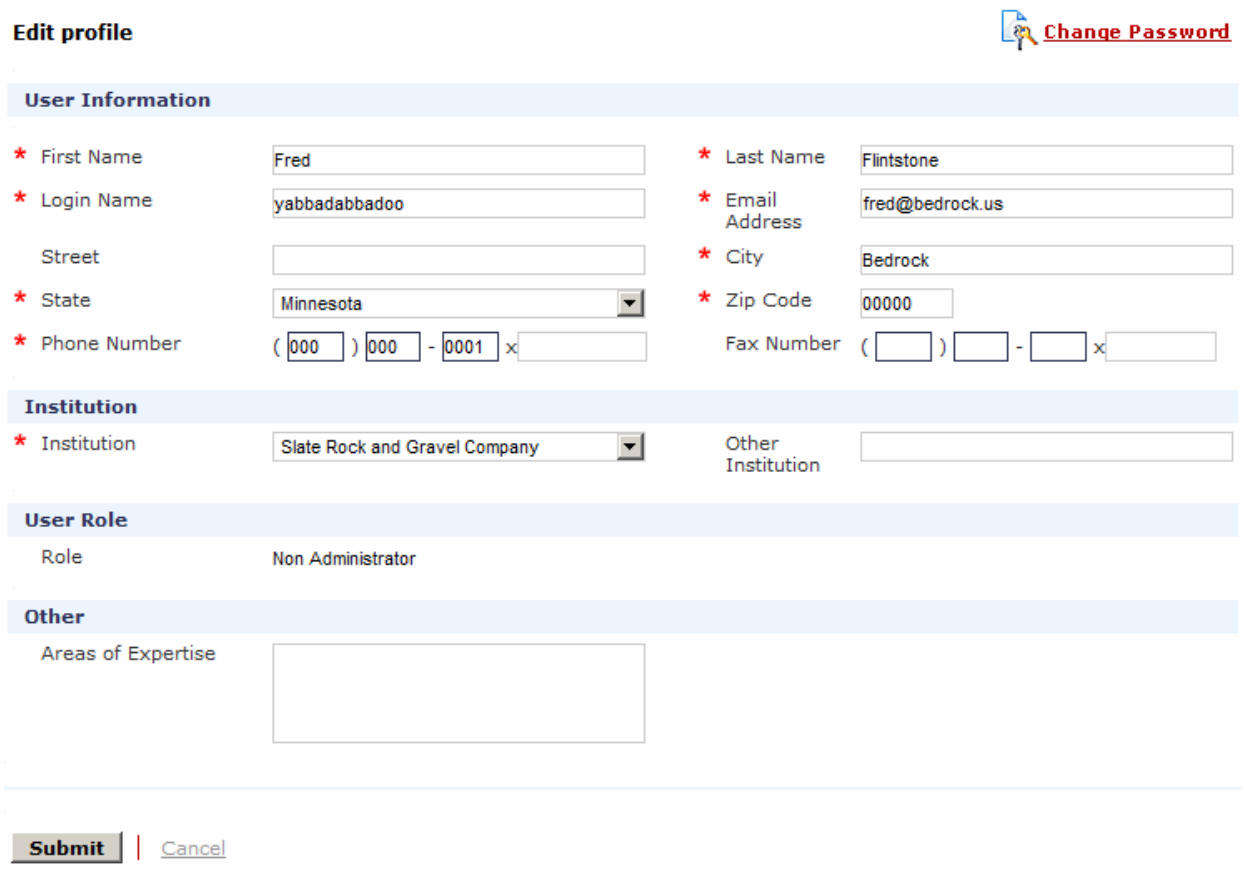


Figure 4.6: Edit user profile form

2. Edit the information as needed.
3. To change your password, click on the **Change Password** link located at the top of the form. This will open the **Change Password** form (Figure 2.4).
4. Click the **Submit** button.

Chapter 5: Managing Workspaces

This chapter reviews the tasks associated with managing workspaces.

The following topics are covered in this chapter:

Creating Workspaces
Viewing and Editing Workspaces

5.1 Creating Workspaces

As part of the review process, workspace leads are asked to approve review requests prior to the initiation of the review. Once an **Administrator** creates a workspace on the system, an **Administrator** can assign one or more users as leads of that workspace.

1. Click the **Create/Edit Workspace** link located in the **Workspace** section of the navigation bar. This opens the **Create Workspace/Workspace List** page (Figure 5.1).

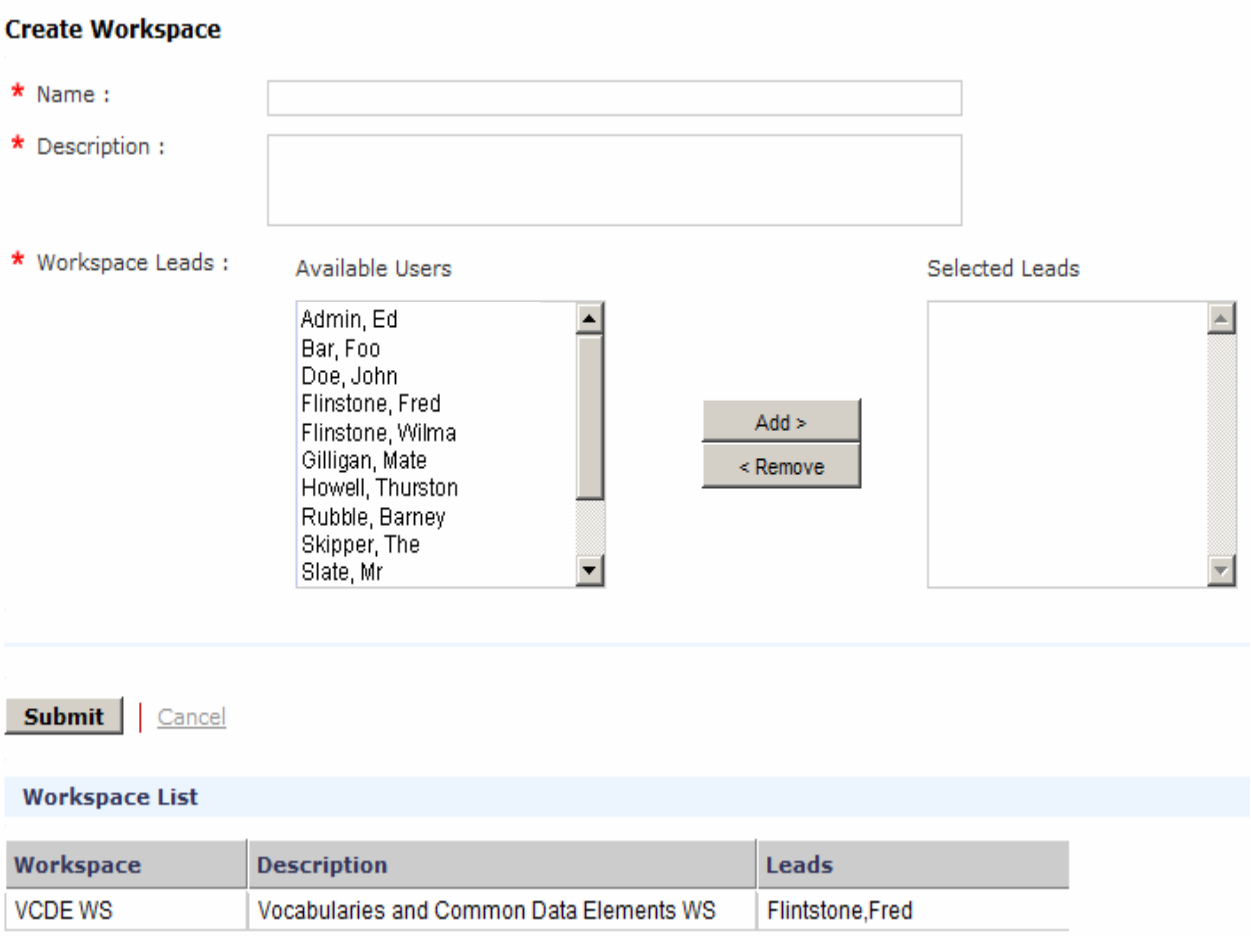


Figure 5.1: The Create Workspace and Workspace List page

2. Enter the name and a description of the new workspace in the Name and Description fields, respectively.
3. To assign a lead to the workspace, select a user from the list of available users and click the **Add** button to add that user to the list of selected leads. To remove a user from the list of selected leads, select the user from the list of selected leads and click the **Remove** button.
4. Add/remove other workspace leads as needed.
5. Click the **Submit** button. The new workspace is added to the **Workspace List** table at the bottom of the page.

5.2 Viewing and Editing Workspaces

Administrators can view and edit workspaces, as well as change which users are assigned as leads of workspaces.

1. Click the **Create/Edit Workspace** link located in the **Workspace** section of the navigation bar. This opens the **Create Workspace/Workspace List** page (Figure 5.1). At the bottom of the page there is a table of all workspaces, which

lists the name, description, and leads of each workspace.

2. Double click the row in the **Workspace List** table that corresponds to the workspace that you want to edit. This loads the name, description, and assigned leads for that workspace into the upper half of the screen, and the title of the page changes from **Create Workspace** to **Edit Workspace**.
3. Edit the name, description, and assigned leads as desired.
4. Click the **Submit** button to save the changes, or click **Cancel** to exit the edit page without saving.

Chapter 6: Managing Checklists

This chapter reviews the tasks associated with managing checklists, such as the Silver level compatibility review checklist.

The following topics are covered in this chapter:

6.1 Adding and Viewing References

Administrators can store URLs on the system that can be viewed by all users. The URLs provide users quick access to reference material.

1. Click the **Add/View References** link located in the **References** section of the navigation bar. This loads the **View/Add References** page (Figure 6.1).

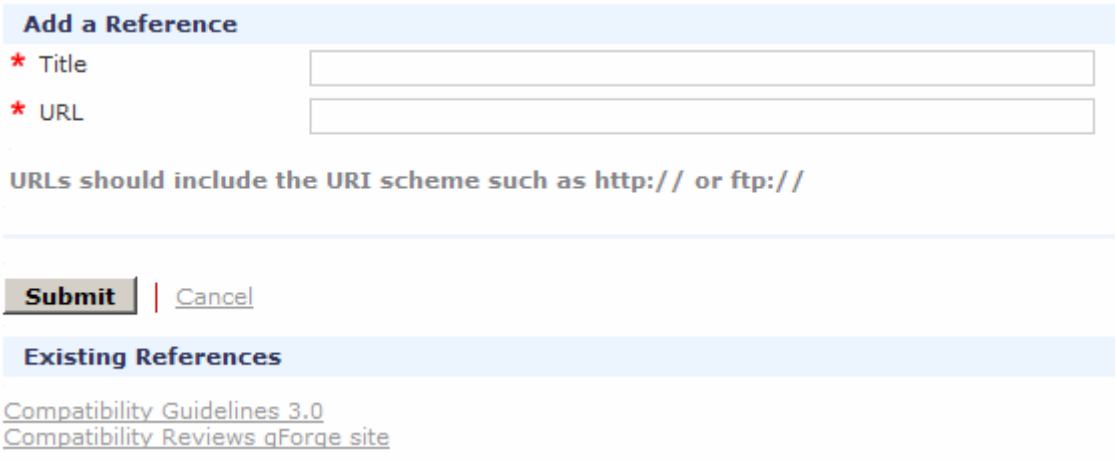


Figure 6.1: View/Add References page

2. The top portion of the page provides a form for adding new references. References have a title (the text that is displayed) and a URL. To add a

reference, enter the information into the form and click the **Submit** button.

Note: The URL should contain the URI scheme, such as "http://", "https://", or "ftp://" so the link is constructed properly.

3. The bottom portion of the page contains a list of references. Each reference is a link, and clicking on it will take you to that page.

6.2 Editing References

Administrators can edit references to ensure that the links are up to date and functional.

Click the **Edit References** link located in the **References** section of the navigation bar. This loads the **Existing References** page, which contains a table of references (

1. Figure 6.2).

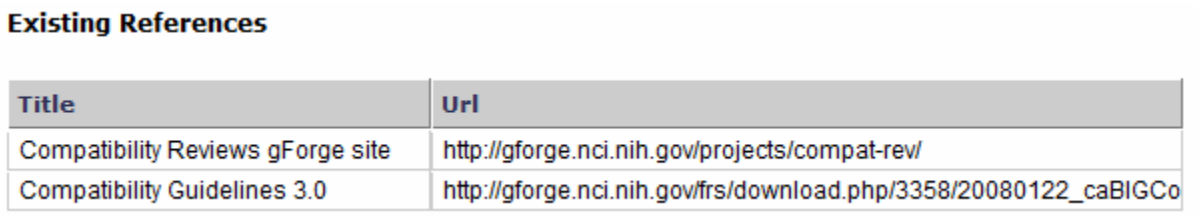


Figure 6.2: Existing References page

Double click a row in the table to open the **Edit a Reference** page, which contains a list of existing references and a form to edit the selected reference (

2. Figure 6.3).

Figure 6.3: Editing a reference

3. Edit the information as desired and click the **Submit** button to save the changes and return to the **View/Add References** page.

6.3 Adding and Editing Checklist Item Types

Checklist items (criteria) can be classified into one of the four areas of interoperability:

- Information Models
- Common Data Elements
- Vocabularies, Terminologies, and Ontologies
- Application Programming and Messaging Interfaces

Each of the four areas of interoperability is considered a "type". In addition, each checklist item can be further classified into a subtype that provides more specificity about the nature of the item. Examples include Best Practices and ISO 11179 Implementation Requirements. The relationship between the types and subtypes are used to order the checklist items when reports are generated.

Administrators have the ability to define checklist item type and subtype categories.

1. Click the **Checklist Item Types** link located in the **Checklists** section of the navigation bar. This loads the **Create Item Type/Subtype** page (Figure 6.4).

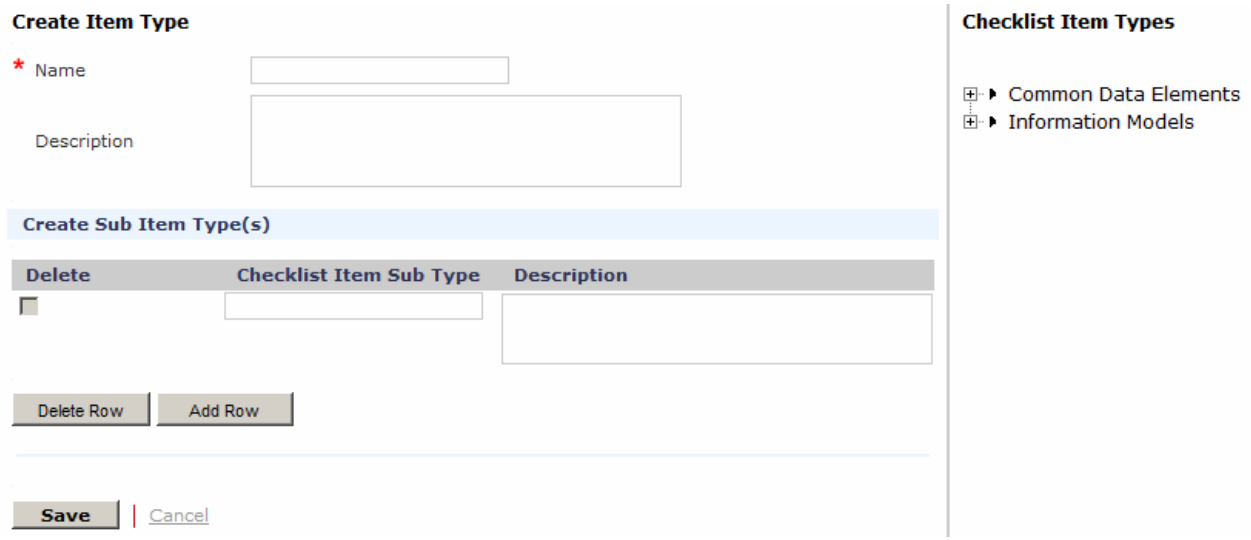


Figure 6.4: Create Checklist Item Type/Subtype page

The page is divided into two sections: the left section contains text boxes for creating new types and subtypes, and the right section displays the type/subtype tree. The type/subtype tree is represented using standard collapse/expand functions. Click [+] to expand a node, and [–] to collapse it.

2. To add a new checklist item type, enter the name and description into the text boxes on the left side of the page.
3. Enter a name and description for a subtype that corresponds to the new type. To add additional subtypes, click the **Add Row** button. To remove a subtype, check the corresponding **Delete** box and click the **Delete Row** button.

   Note: You must include at least one subtype when adding a new type.

4. When you are finished, click the **Save** button (Figure 6.5). This saves the new item to the system and updates the tree on the right. A message indicates that the new checklist type was successfully created and the text boxes are cleared so another type can be created.

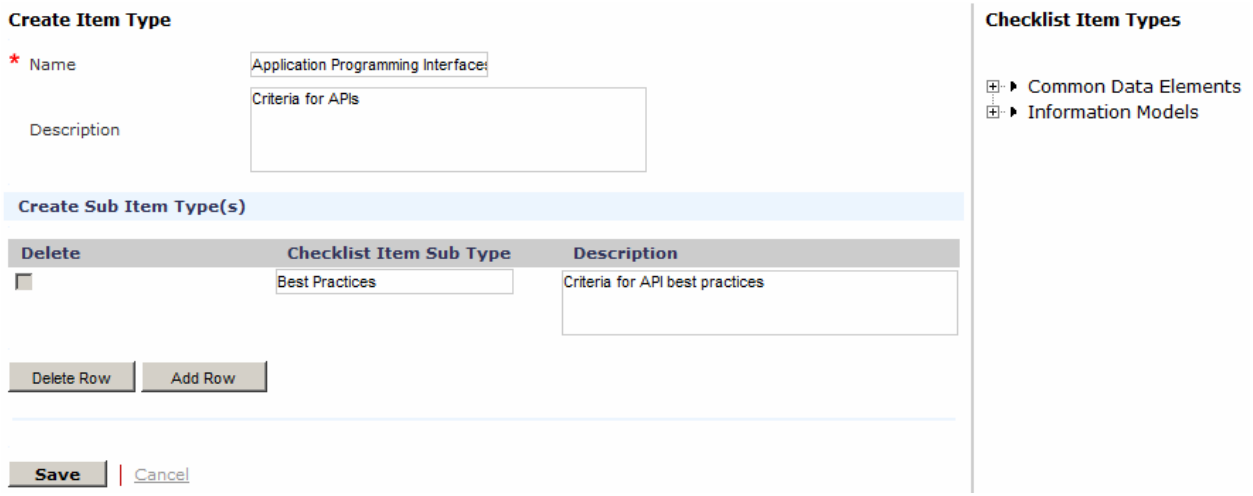


Figure 6.5: Creating a new checklist item type and subtypes

Administrators can edit existing checklist item types and subtypes.

1. Click the **Checklist Item Types** link located in the **Checklists** section of the navigation bar. This loads the **Create Item Type/Subtype** page.
2. Click on one of the checklist item types in the tree on the right side of the page. This loads the data into the fields on the left side of the page (Figure 6.6).

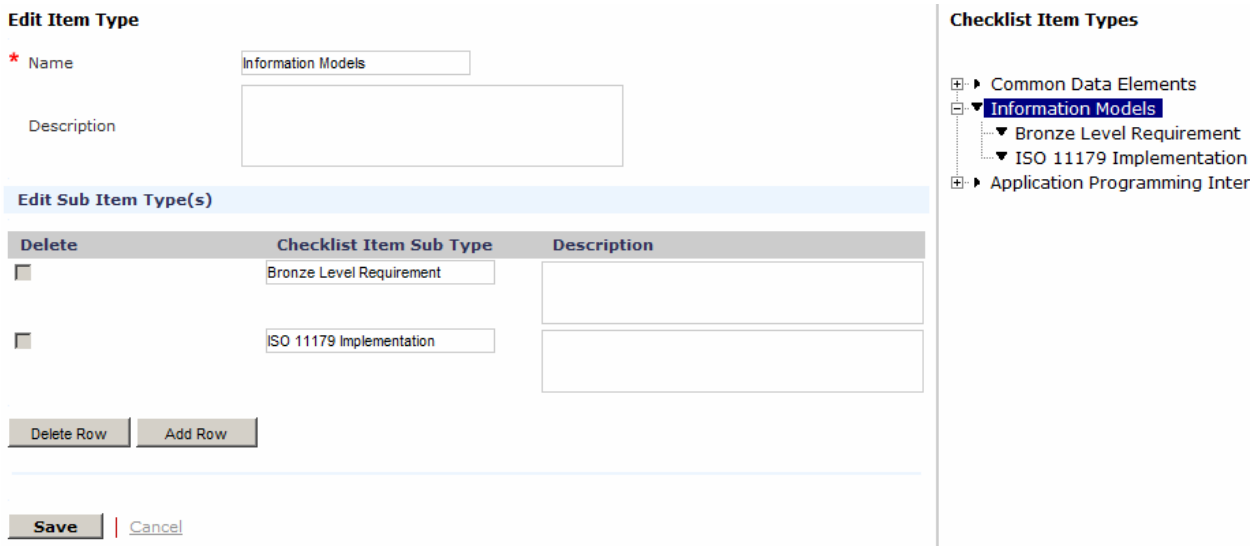


Figure 6.6: Editing an existing checklist item type and subtype

3. Edit the names and descriptions as desired.

Note: Additional subtypes can be added using the **Add Row** button. Types and subtypes can be deleted from the tree only if they are not used (i.e., as long as there are not any checklist items assigned to them).

4. When you are finished, click the **Save** button. A message indicates that the new checklist type was successfully updated.

6.4 Adding and Editing Checklist Item Grades

Each checklist item (criteria) is assigned a grade that indicates how much flexibility a model is allowed in meeting the criteria and still passing a review. Grading information (color codes) are included in the compatibility reports for each checklist item. **Administrators** can add new grades and edit existing grades.

1. Click the **Checklist Item Grades** link located in the **Checklists** section of the navigation bar. This loads the **Add New Grade/Grading Level List** page (Figure 6.7).

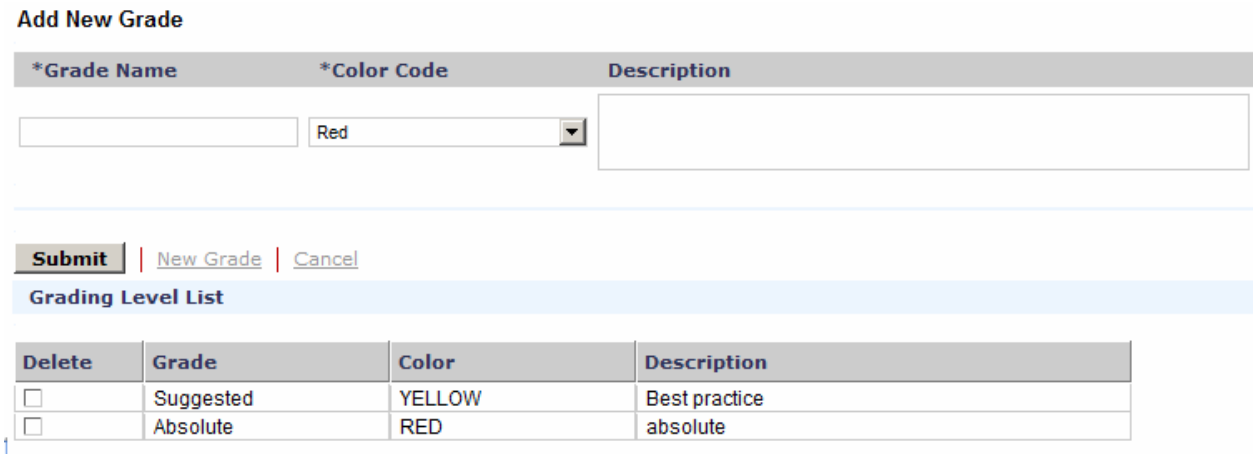


Figure 6.7: The add new grade and grading level list page

2. To add a new grading level, enter the name of the grade, select a color code from the drop-down menu, and enter a description.
3. To add additional grades, click the **Add Row** button. To remove a grade, check the corresponding **Delete** box and click the **Delete Row** button.
4. Click the **Submit** button.

Administrators can edit existing grading levels.

1. Click the **Checklist Item Grades** link located in the **Checklists** section of the navigation bar. This loads the **Add New Grade/Grading Level List** page (Figure 6.7).
2. Double click the row in the **Grading Level List** table that corresponds to the grade that you want to edit. This loads the name, color code, and description into the upper half of the screen, and the title of the page changes from **Add New Grade** to **Edit Grade**.

3. Edit the name, color code, and description as desired.
4. Click the **Submit** button to save the changes, or click **Cancel** to exit the edit page without saving.

6.5 Granularity of Checklist Items

Each checklist item is assigned a granularity that specifies which element(s) of a model the item applies to. Currently there are four granularity levels:

Project: The item applies at a project level, which means it is only answered once during a review. For example, a project level item might specify that a particular type of file is in a certain format.

Class: The item applies to all classes and is answered for each class in the model. For example, a class level item might specify naming conventions for classes in UML models.

CDE: The item applies to all CDEs (attributes) in the model. For example, a CDE level item might specify how a CDE is constructed or how the corresponding UML attribute is named.

Association: The item applies to all associations in the model. For example, an association level item might specify rules defining multiplicity in UML models.

An additional granularity type, Method, will be added when additional features are added that provide more extensive support for Architecture reviews.

6.6 Creating Checklist Groups

Checklist groups contain one or more checklists. **Administrators** can create new checklist groups, which will subsequently be assigned to compatibility review projects.

1. Click the **Create New Checklist** link located in the **Checklists** section of the navigation bar. This loads the **Create New Checklist** page (Figure 6.8).

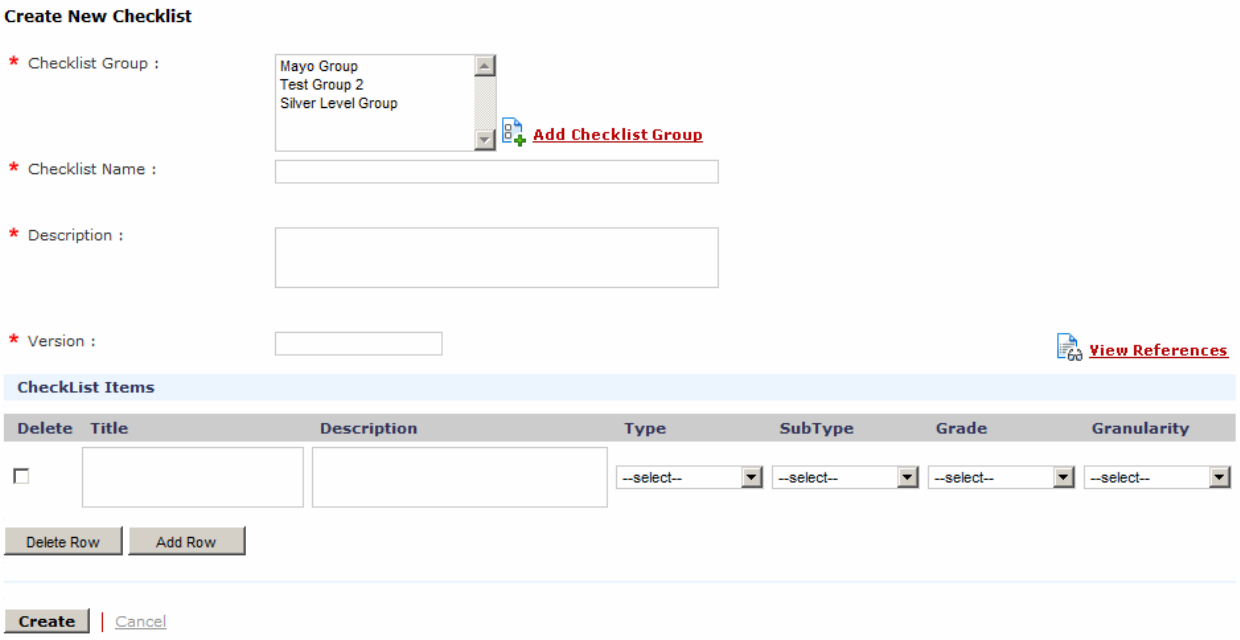


Figure 6.8: The Create New Checklist page

2. Click the **Add Checklist Group** link to open the **Add Checklist Group** window (Figure 6.9).

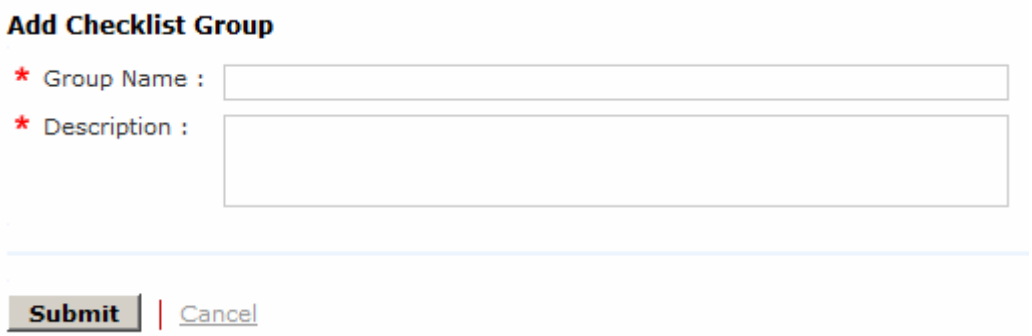


Figure 6.9: The Add Checklist Group page

3. Enter the name and a description of the checklist group.
4. Click the **Submit** button to create the checklist group, or click **Cancel** to exit the window without creating the checklist group.

Note: Currently it is not possible to delete checklist groups, and the ability to modify existing groups is limited. Improved maintenance functions for checklist groups will be added in a future release.

6.7 Creating New Checklists

Administrators can create the checklists that are used during compatibility reviews.

1. Click the **Create New Checklist** link located in the **Checklists** section of the navigation bar. This loads the **Create New Checklist** page (Figure 6.8).
2. Select a checklist group from the list, or create a new checklist group.
3. Enter a name, description, and version number for the new checklist.
4. Enter a title (name) and description for the first item on the checklist. Select the type, subtype, grade, and granularity for the item from the drop-down menus.
5. To add more items, click the **Add Row** button. To remove an item, check the corresponding **Delete** box and click the **Delete Row** button (Figure 6.10).

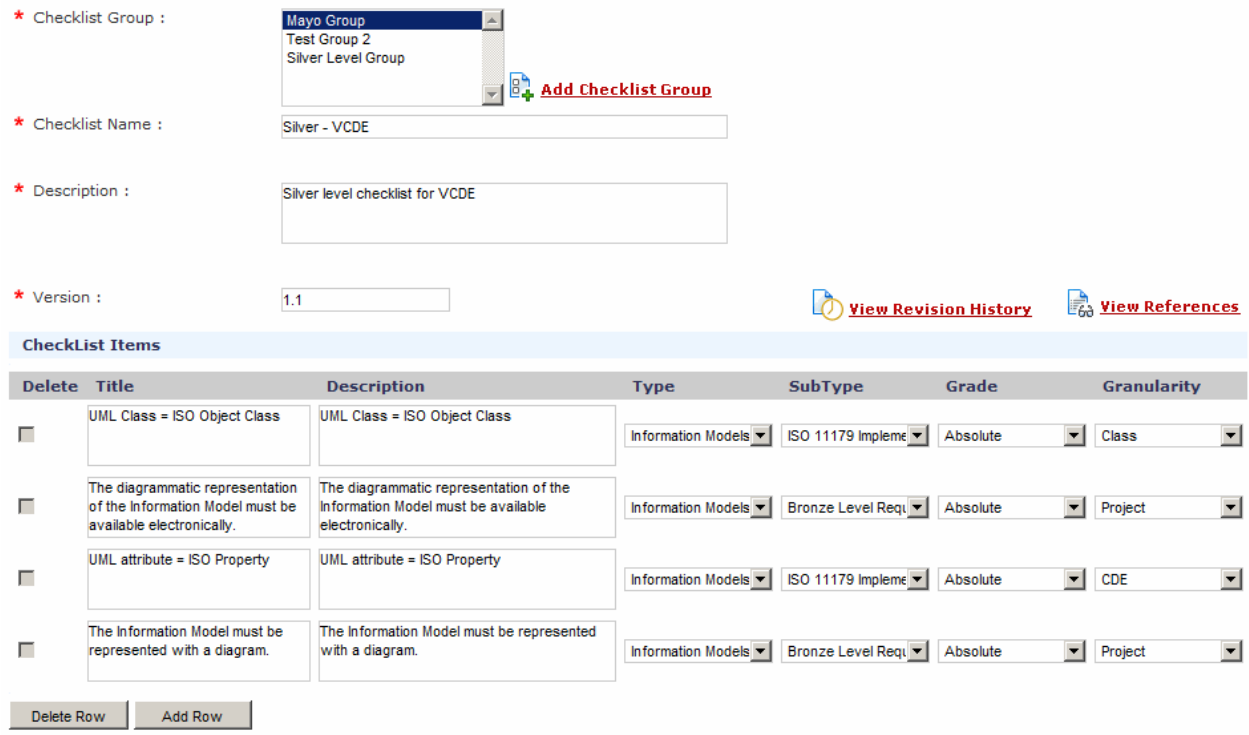


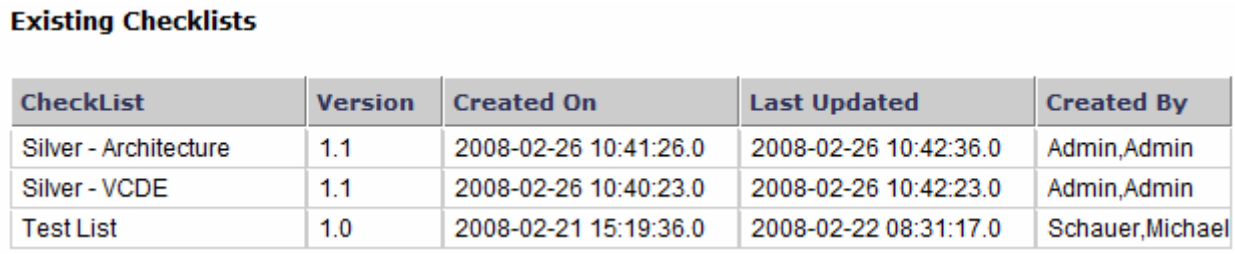
Figure 6.10: Creating a new checklist

6. When you are finished, click the **Create** button to save the checklist on the system.

6.8 Editing Checklists

Administrators can update checklists as they change over time.

1. Click the **Edit Checklists** link located in the **Checklists** section of the navigation bar. This loads the **Existing Checklists** page, which contains a table that lists all of the checklists in the system (Figure 6.11).



Existing Checklists

CheckList	Version	Created On	Last Updated	Created By
Silver - Architecture	1.1	2008-02-26 10:41:26.0	2008-02-26 10:42:36.0	Admin,Admin
Silver - VCDE	1.1	2008-02-26 10:40:23.0	2008-02-26 10:42:23.0	Admin,Admin
Test List	1.0	2008-02-21 15:19:36.0	2008-02-22 08:31:17.0	Schauer,Michael

Figure 6.11: The Existing Checklists table

2. Double click the row in the table that corresponds to the checklist that you want to edit. This opens the **Edit Checklist** page (Figure 6.12).

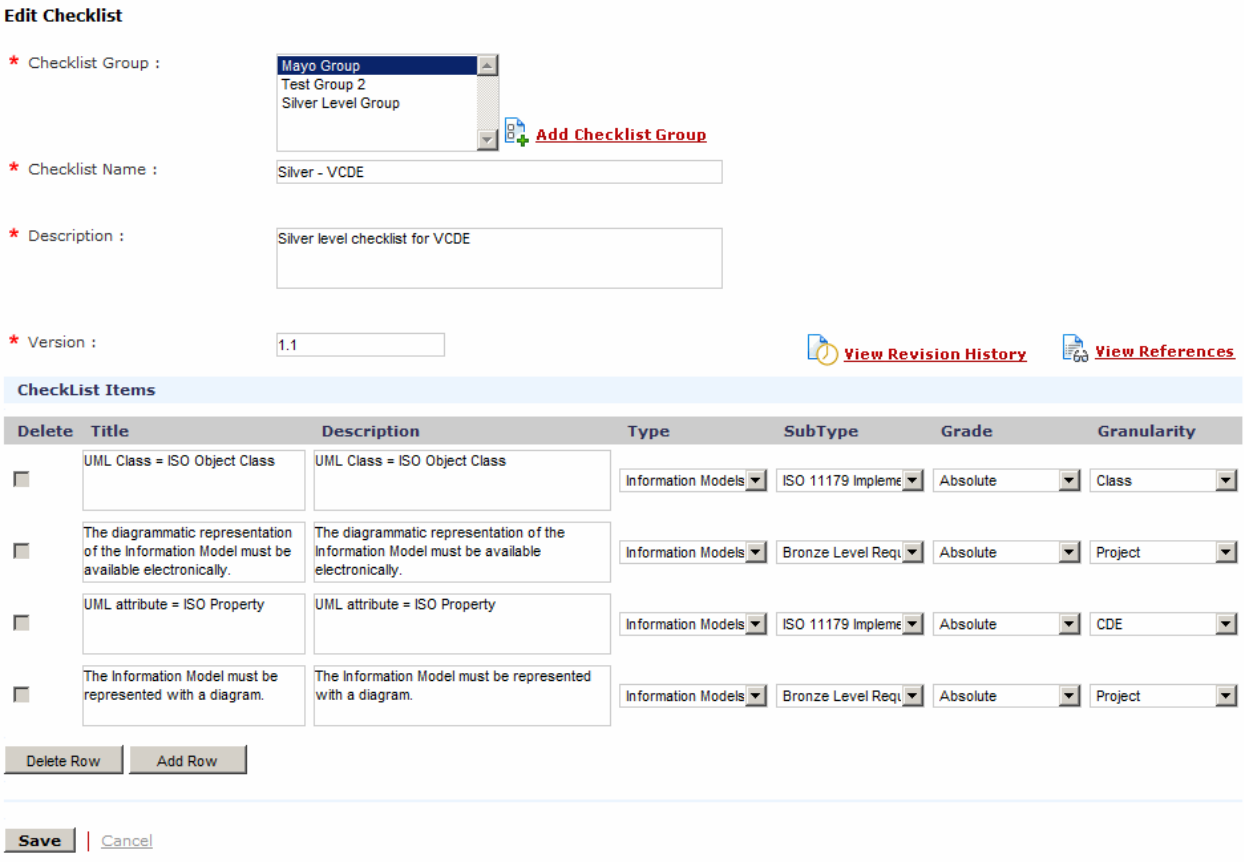


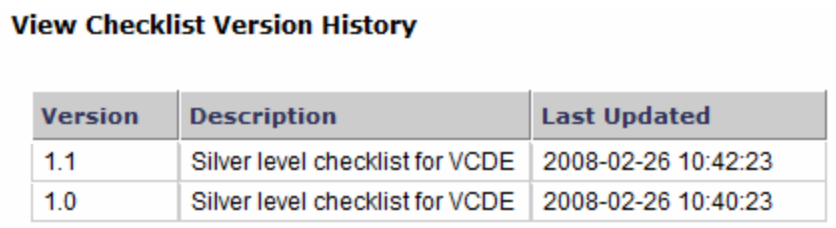
Figure 6.12: The Edit Checklist page

3. Edit the checklist as desired.
4. Click the **Save** button to save the changes, or click **Cancel** to exit the page without saving.

6.9 Viewing Checklist Version History

Administrators can track the version history of checklists by viewing previous versions.

1. Click the **Edit Checklists** link located in the **Checklists** section of the navigation bar. This loads the **Existing Checklists** page, which contains a table that lists all of the checklists in the system (Figure 6.11).
2. Double click the row in the table that corresponds to the checklist for which you want to view a previous version. This opens the **Edit Checklist** page (Figure 6.12).
3. Click on the **View Revision History** link, located to the right of the version number. This opens the **View Checklist Revision History** page, which lists all of the previous versions of the checklist (Figure 6.13).

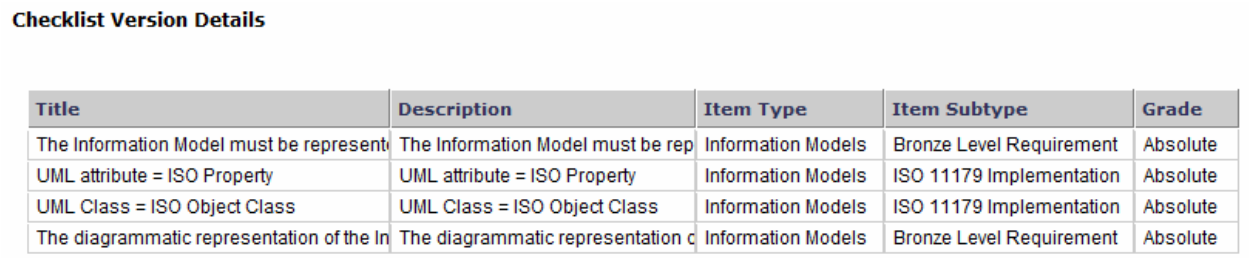


View Checklist Version History

Version	Description	Last Updated
1.1	Silver level checklist for VCDE	2008-02-26 10:42:23
1.0	Silver level checklist for VCDE	2008-02-26 10:40:23

Figure 6.13: The checklist version history table

4. Double click a record in the table to view that version of the checklist (Figure 6.14).



Checklist Version Details

Title	Description	Item Type	Item Subtype	Grade
The Information Model must be represent	The Information Model must be rep	Information Models	Bronze Level Requirement	Absolute
UML attribute = ISO Property	UML attribute = ISO Property	Information Models	ISO 11179 Implementation	Absolute
UML Class = ISO Object Class	UML Class = ISO Object Class	Information Models	ISO 11179 Implementation	Absolute
The diagrammatic representation of the In	The diagrammatic representation c	Information Models	Bronze Level Requirement	Absolute

Figure 6.14: Viewing an old version of a checklist

Chapter 7: Managing Projects

This chapter reviews the tasks associated with managing review projects. Tasks associated with initiating, performing, and concluding reviews are reviewed in subsequent chapters.

The following topics are covered in this chapter:

7.1 Editing the Submission Package File List

There is a single submission package file list for all checklists on the system (this may change in future releases). The file list controls which files are required and which are optional when the developer assembles the submission package prior to the review. **Administrators** can edit the submission package file list.

1. Click the **Submission Package File List** link located in the **Projects** section of the navigation bar. This loads the **Manage Submission Package File List** page, populated with the latest version of the file list (Figure 7.1).

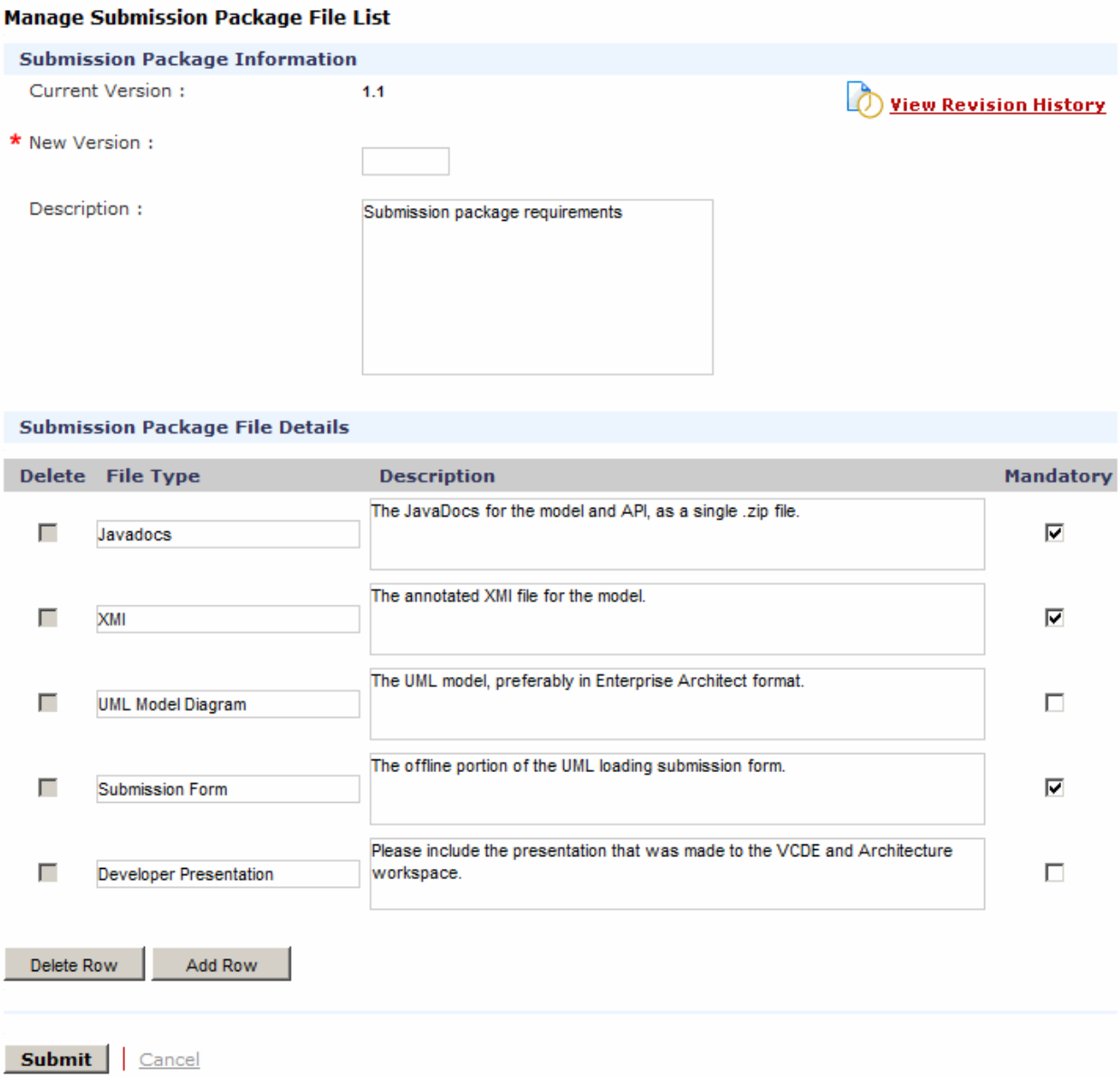


Figure 7.1: The submission package file list page

2. Edit the text fields in the file list as desired, and enter a new version number. The check box in the **Mandatory** column indicates whether each file type is mandatory or optional in the submission package. Developers will not be able to submit the submission package until all mandatory files have been uploaded to the system. Use the **Add Row** and **Delete Row** functions to add or delete file types from the submission package file list.
3. Click the **Submit** button.

   Note: If you submit a new version of the file list, you must increase the version number. The system will not allow you to overwrite an existing version of the file list or decrease the version number.

7.2 Viewing Previous Versions of the Submission Package File List

Administrators can view previous versions of the submission package file list.

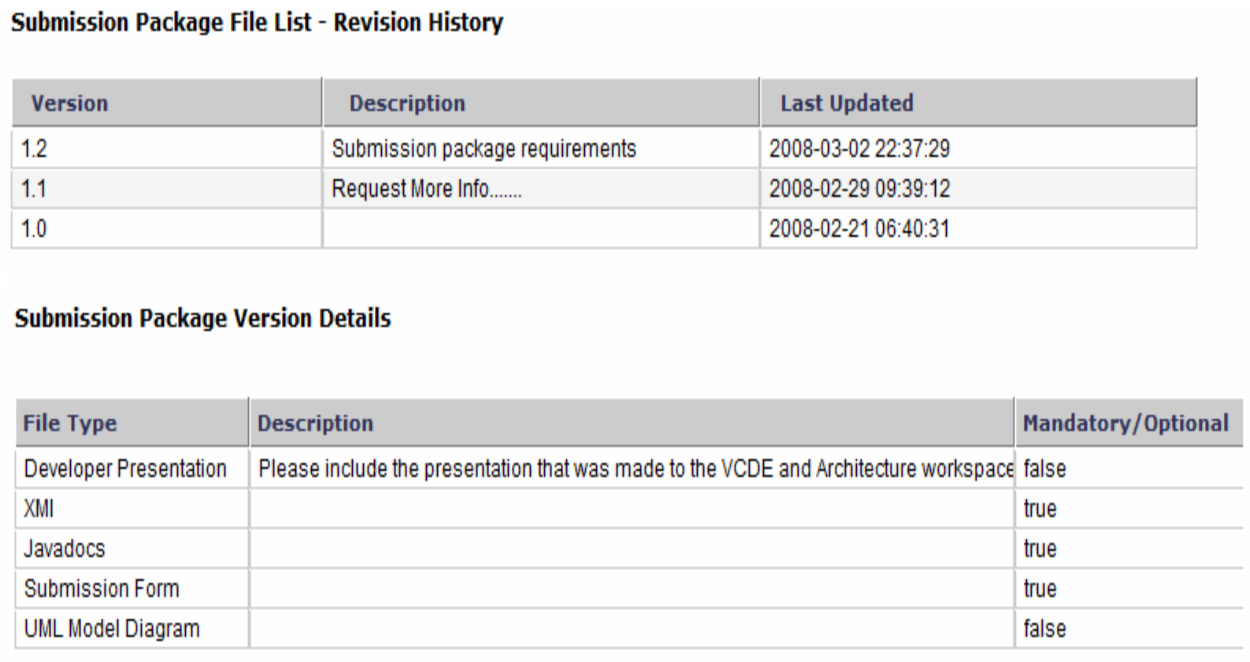
1. Click the **Submission Package File List** link located in the **Projects** section of the navigation bar. This loads the **Manage Submission Package File List** page (Figure 7.1).
2. Click the **View Revision History** link, located to the right of the file list description and above the file type table. This opens the **View Submission Package Revision History** page, which contains a table that lists all of the previous versions of the submission package file list (Figure 7.2).

Submission Package File List - Revision History

Version	Description	Last Updated
1.2	Submission package requirements	2008-03-02 22:37:29
1.1	Request More Info.....	2008-02-29 09:39:12
1.0		2008-02-21 06:40:31

Figure 7.2: The submission package revision history page

3. Click on a version number to view that version of the submission package file list. The file list is displayed in a table located under the version table (Figure 7.3).



Submission Package File List - Revision History

Version	Description	Last Updated
1.2	Submission package requirements	2008-03-02 22:37:29
1.1	Request More Info.....	2008-02-29 09:39:12
1.0		2008-02-21 06:40:31

Submission Package Version Details

File Type	Description	Mandatory/Optional
Developer Presentation	Please include the presentation that was made to the VCDE and Architecture workspace	false
XMI		true
Javadocs		true
Submission Form		true
UML Model Diagram		false

Figure 7.3: Viewing previous versions of the submission package file list

Chapter 8: Managing Reports

This chapter reviews the tasks associated with managing reports.

The following topics are covered in this chapter:

Creating Report Templates
Uploading Report Templates

8.1 Creating Report Templates

This feature was cut from the current development cycle. It will be added in a future release.

8.2 Uploading Report Templates

This feature was cut from the current development cycle. It will be added in a future release.

Chapter 9: Initiating a Review

This chapter reviews the tasks associated with initiating a review.

The following topics are covered in this chapter:

9.1 Submitting a Model for Loading

Developers can submit a UML model for loading onto the caDSR by assembling and submitting a submission package. Models must be loaded onto the caDSR before they can be submitted for a compatibility review.

1. Click the **Assemble Submission Packages** link located in the **Projects** section of the navigation menu. This loads the **Submission Packages** page (Figure 9.1).

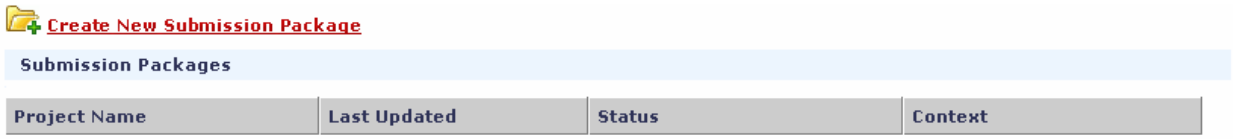


Figure 9.1: Submission Packages table

2. Click on **Create a new submission package** to open the **Request a Review** page (Figure 9.2), which contains two tabs.

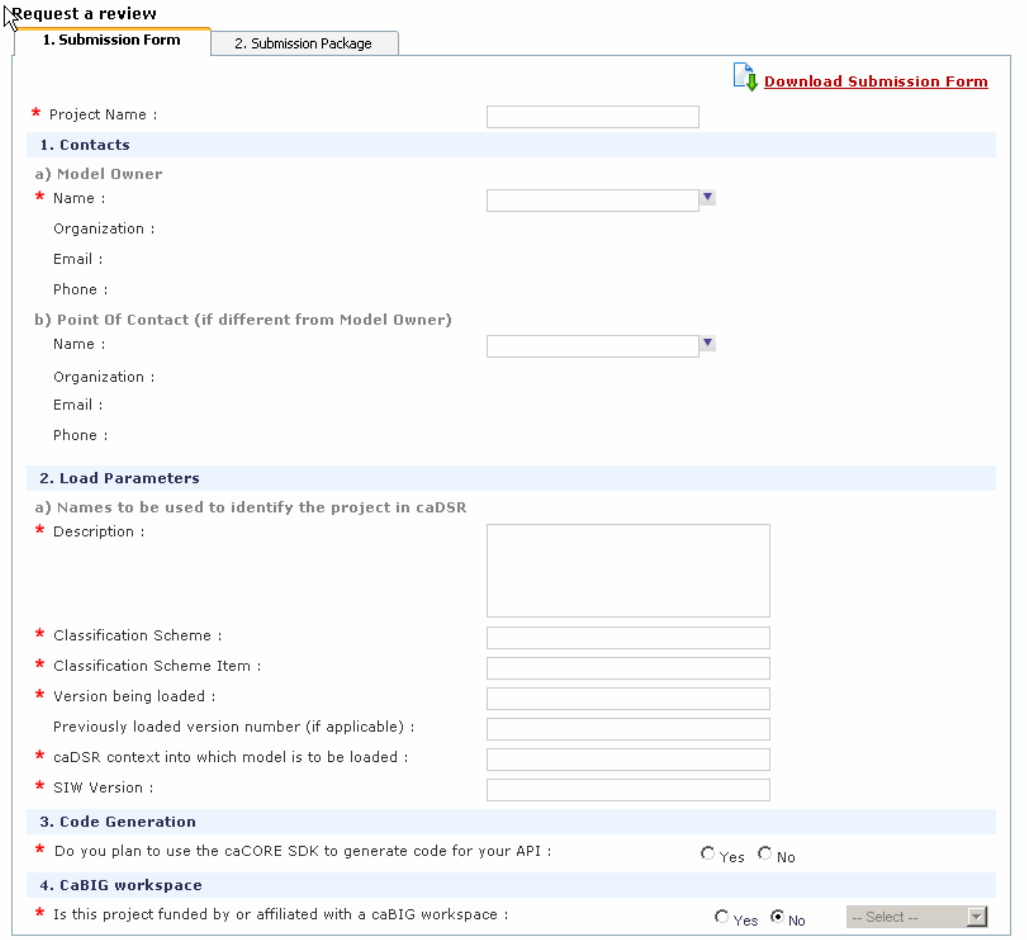


Figure 9.2: Request a Review page, submission form

3. The submission form is in two parts. The first part of the form is online, located on the first tab of the **Request a Review** page (Figure 9.2). The second part is located in a document that must be downloaded, edited offline, and uploaded as part of the submission package.
4. Click on the **Download Submission Form** link to download the offline portion of the submission package. Fill it out according to the instructions within that document.
5. Fill out the online portion of the submission form.
6. Click on the **Submission Package** tab to open a page that allows you to upload each file in the submission package (Figure 9.3).

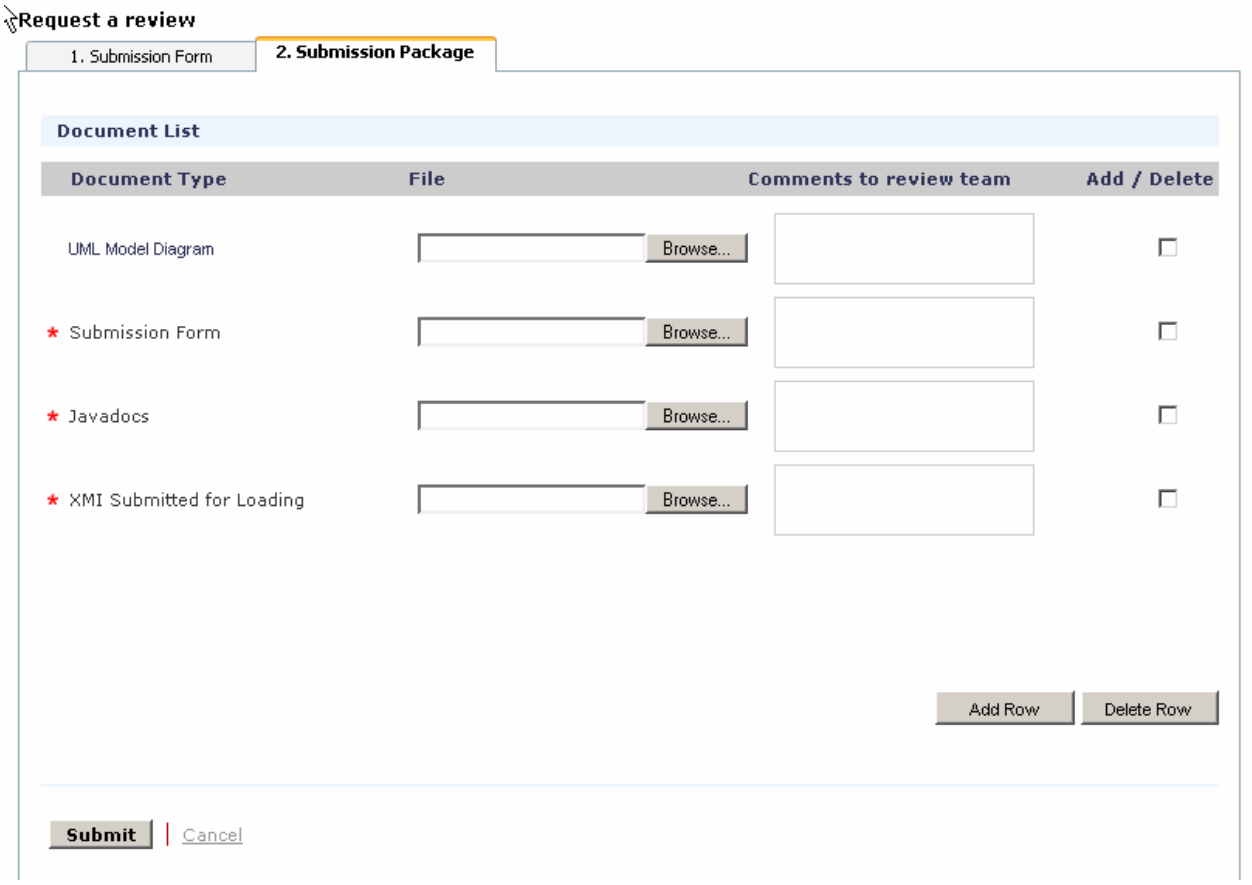


Figure 9.3: Request a Review page, submission package (file upload) form

Note: Files marked with an asterisk are required for the review, whereas files without an asterisk are optional but recommended to provide additional context for the review team. Comment boxes are provided that allow you to add comments about specific files that may be helpful to the review team.

7. Click the **Browse** button next to each document type to open a window that allows you to specify the location of the file that you wish to upload to the system.
   a. If you want to upload more than one file for a given document type, select the **Add**/**Delete** check box for that document type and click the **Add Row** button.
   b. To delete a row that you added by mistake, select the **Add**/**Delete** check box for that row and click the **Delete Row** button.

Note: The offline portion of the submission form should be uploaded as the **Submission Form** file. This file contains extra information for the caDSR loading and curation teams, as well as information used by the NCICB training teams.

Note: You may only delete rows that you added using the **Add Row** button. Rows that are displayed by default (based on the submission package file list) cannot be deleted.

8. When you are finished, click either the **Submit** button or the **Cancel** link.
   a. The **Submit** button is used to submit the submission package to the **caDSR UML loading team**.

9.2 Loading a Model

When a **Developer** submits a model for loading, the **caDSR UML loading team** receives an email notifying them of the submission. A team member can log into the CRS and access the submission package. Once the model has been loaded onto the caDSR, the version of the XMI file that was loaded onto the caDSR can be uploaded onto the CRS.

1. When a member of the **caDSR UML loading team** logs in, the request for loading the model appears on their dashboard under the heading **Submission Package Requests** and the project has a status of "Loading Model Into caDSR" (Figure 9.4). The information is also accessible via the **Assemble Submission Packages** link located in the navigation menu.

Figure 9.4: Request for loading a model into the caDSR

2. Double click the project to open the **Request a Review** page, which provides access to the online submission form (Figure 9.5) and to the files in the submission package (Figure 9.6).

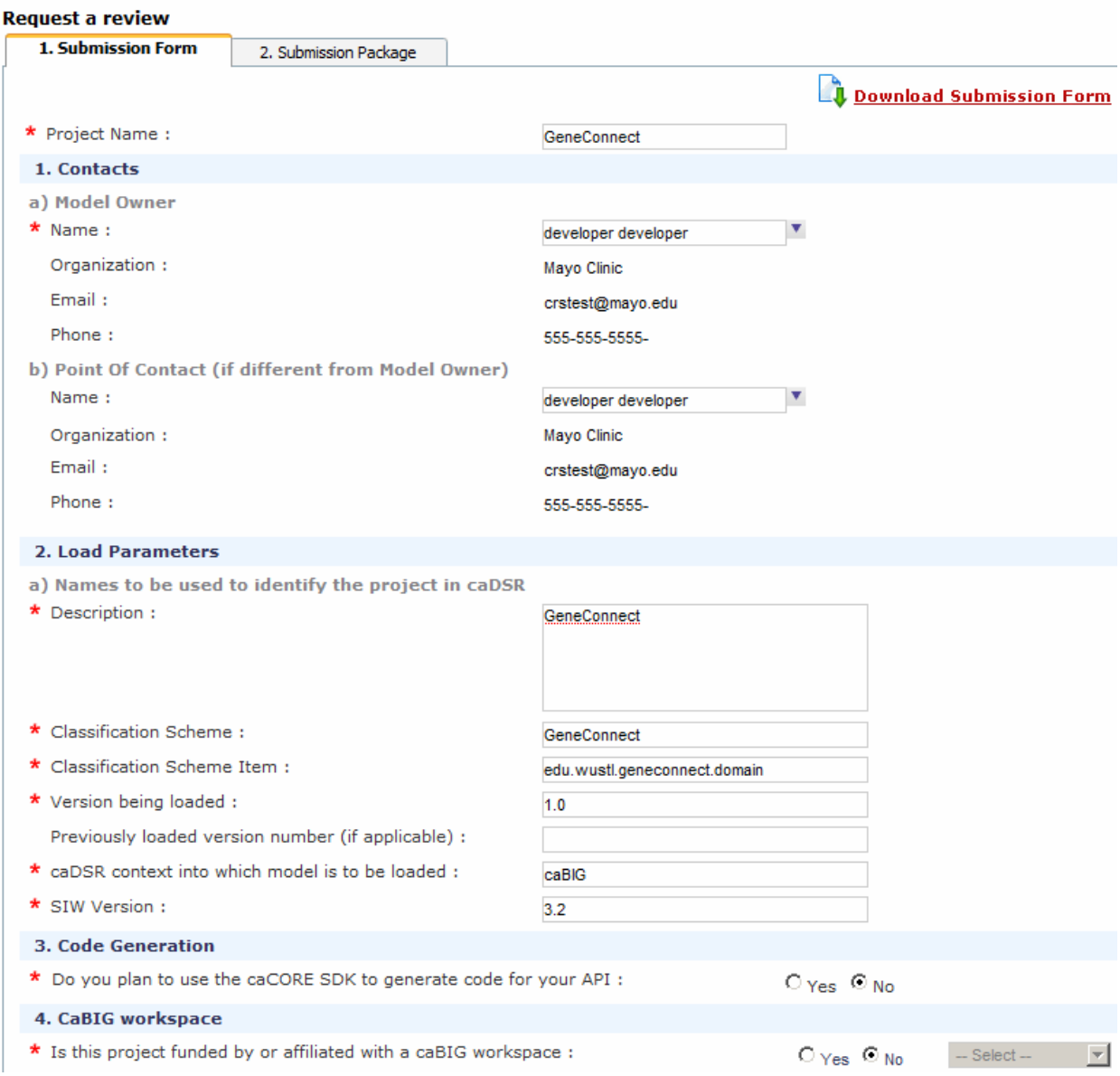


Figure 9.5: Request a review page for loading onto the caDSR

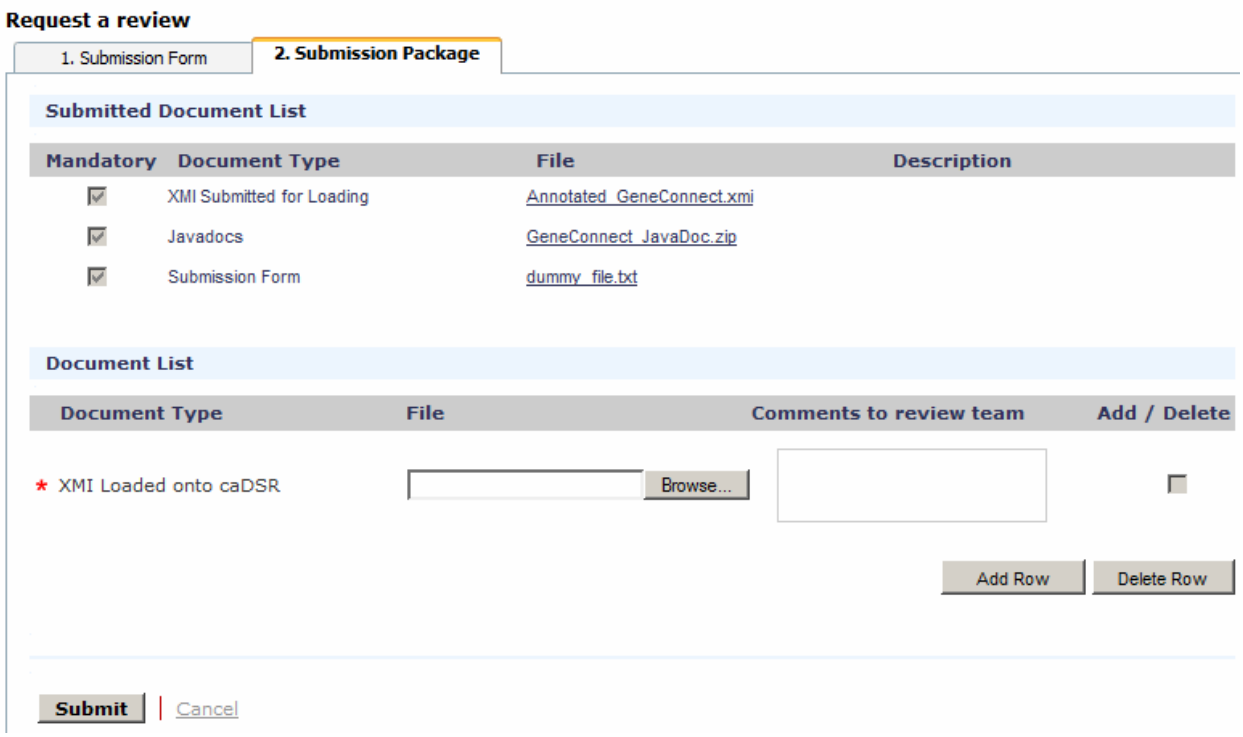


Figure 9.6: Request a review page, files submitted for loading onto the caDSR

3. Download the XMI file submitted for loading by clicking on the filename.
4. Load the model onto the caDSR using the current process. Communication with the **Developer** should take place outside of the CRS system.
5. Once the model is loaded onto the caDSR and the **Developer** approves it, log back onto the CRS and return to the submission package page (Figure 9.6).
6. Click the **Browse** button for the "XMI Loaded onto caDSR" file to open a window that allows you to specify the location of the XMI file that was loaded onto the caDSR.
7. Click the **Submit** button to upload the file to the system. This changes the project status to "Model Loaded into caDSR" and returns control of the submission package to the **Developer**, who is notified via email and who may then request a compatibility review.

9.3 Requesting a Review

Once the model is loaded onto the caDSR the **Developer** may request a compatibility review.

1. After the model has been loaded onto the caDSR, control of the submission package returns to the **Developer**. The submission package can be accessed on the dashboard in the **Submission Package Requests** table or by clicking on the "Assemble Submission Packages" link in the navigation menu.

2. Double click the project to open the **Request a Review** page, which provides access to the online submission form (Figure 9.5) and to the files in the submission package (Figure 9.7).

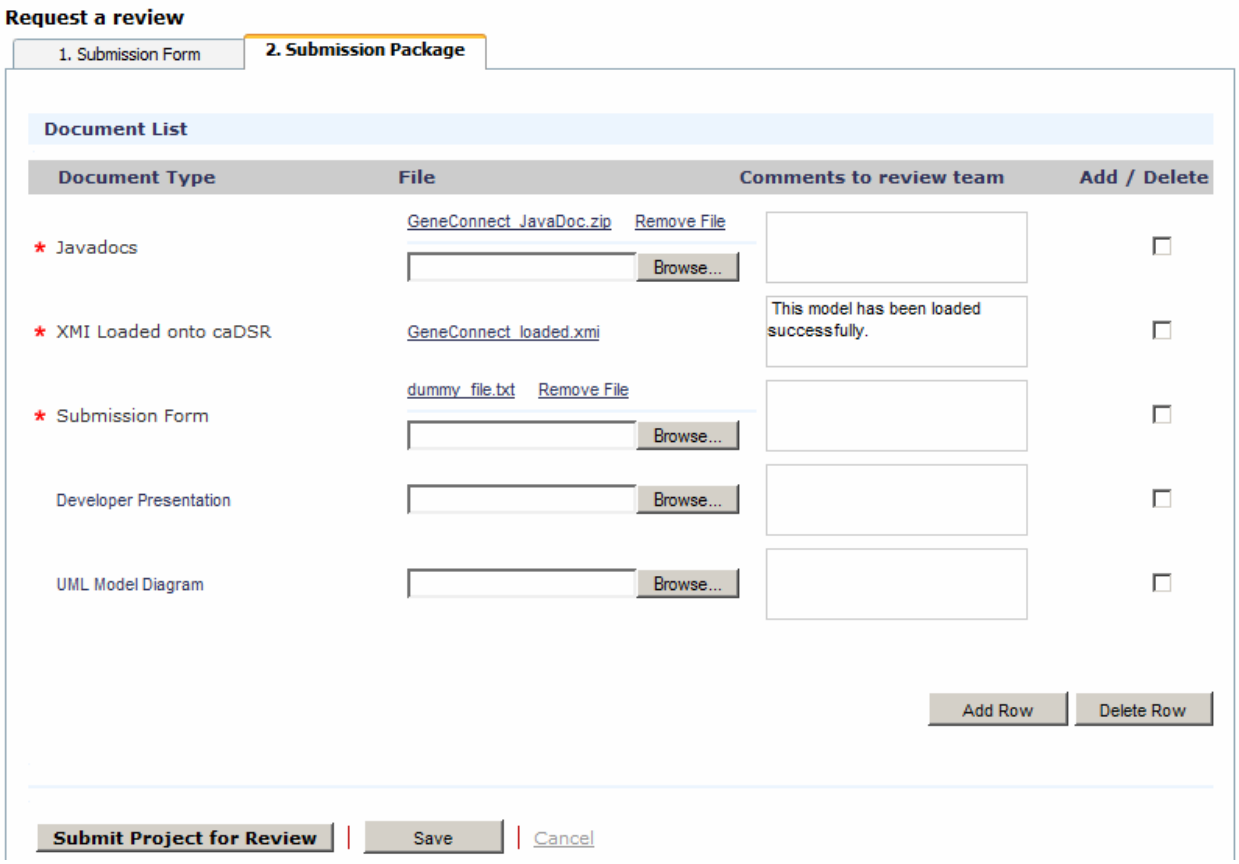


Figure 9.7: Request a review page, after loading onto the caDSR

3. Complete the assembly of the submission package. Files may be added or replaced as needed.
   a. Add files to the submission package as described in Section 9.1: Submitting a Model for Loading.
   b. To replace a file, click on the **Remove File** link to delete it from the submission package. When the page reloads you may add a new file in its place.

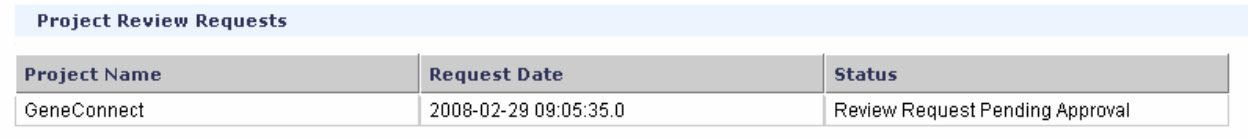
   Note: The file labeled "XMI Loaded onto caDSR" cannot be removed or updated.

4. Click the **Save** button to save the submission package and continue working on it later. Click **Cancel** to exit without saving.
5. Click the **Submit Project for Review** button when the submission package is complete and you wish to submit it for review.

9.4 Creating New Review Projects

Once a **Developer** assembles a submission package and submits the project for review, an **Administrator** can approve it and create a new compatibility review project on the system.

1. When a **Developer** submits a review request, an email is sent to the **Administrators** informing them of the request. The request appears on the **Administrator's** dashboard under the heading **Project Review Requests** with a status of "Review Request Pending Approval" (Figure 9.8). The request also appears on the **Create Projects** page, which can be opened by clicking on the **Create New Project** link in the **Projects** section of the navigation menu.


Project Review Requests

Project Name	Request Date	Status
GeneConnect	2008-02-29 09:05:35.0	Review Request Pending Approval

Figure 9.8: The Administrator's Project Review Requests table

2. Double click the project to open the **Create New Project** page (Figure 9.9), which has three tabs.

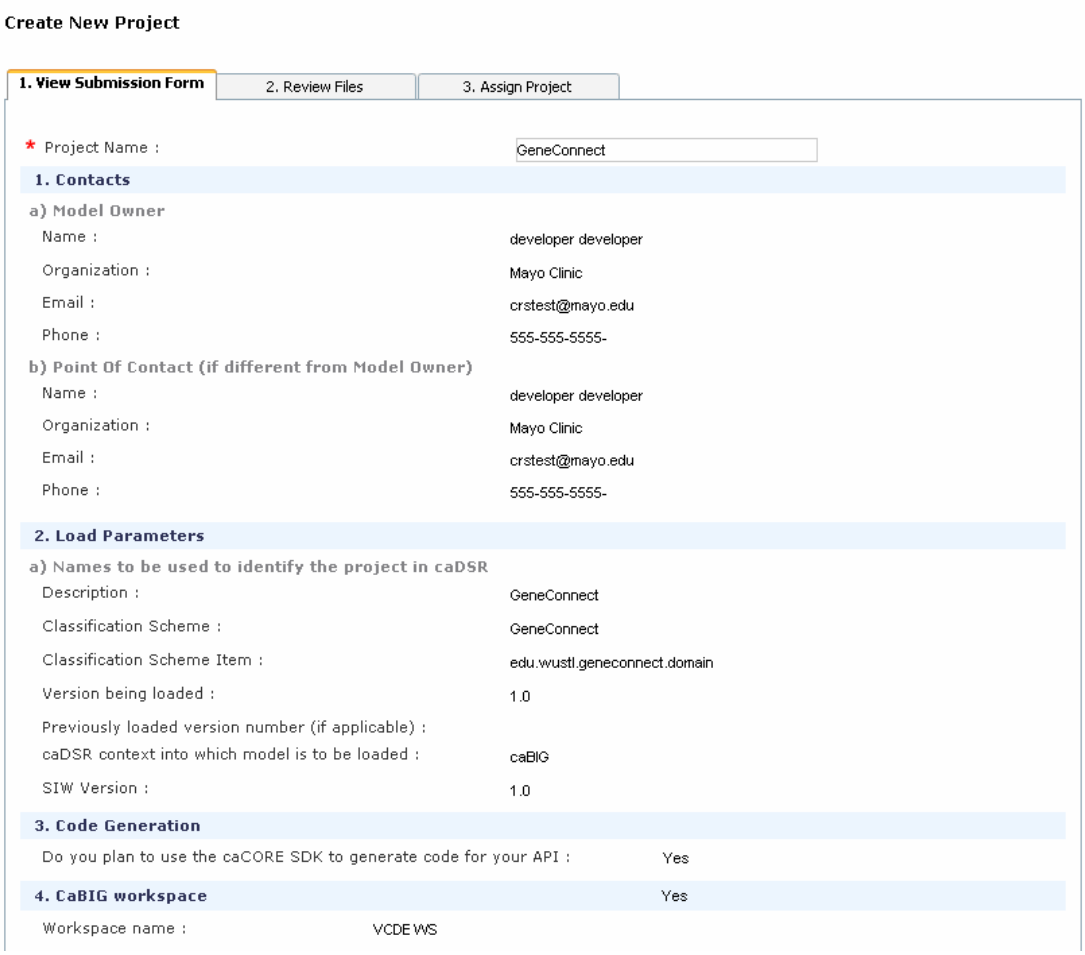


Figure 9.9: Create New Project page, View Submission Form tab

3. The **View Submission Form** tab, displays the **Developer's** contact information and the caDSR loading parameters (Figure 9.9).
4. The second tab, **Review Files**, contains a table that lists each file in the submission package and any comments that were included when the **Developer** uploaded the file (Figure 9.10). Each file name is a link that allows the **Administrator** to download and view the file. In addition, the "Download Submission Package" link allows the **Administrator** to download all of the files in the submission package as a single compressed file (in .zip format).

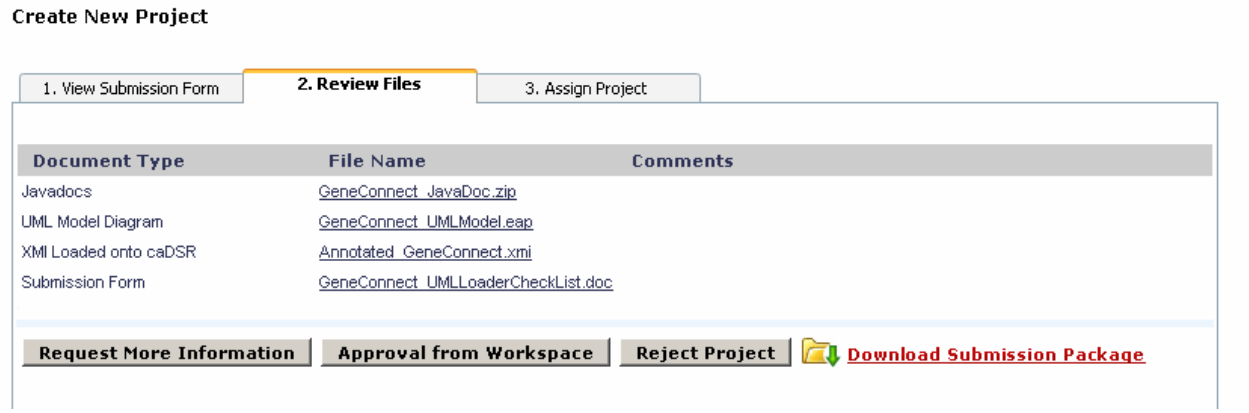


Figure 9.10: Create New Project page, Review Files tab

5. The **Administrator** may perform a preliminary review of the submitted files, if desired. The **Administrator** may take three different actions on this page:
   a. If you want to request more information from the **Developer** about the content of the submission package, click the **Request More Information** button (see below).
   b. If you want to create a review project for this submission package and the project was funded by caBIG™, click the **Approval from Workspace** button. The **Workspace Lead** will be notified that a compatibility review has been requested for the project and will be asked to sign off on the request (see below).

   Note: The **Approval from Workspace** button will not appear if the **Developer** indicated that the project was not associated with a caBIG™ workspace (Figure 9.2). If workspace approval has already been granted the button will be disabled.

   c. If you do not want to create a review project for this submission package, click the **Reject Project** button. The **Developer** will get an email message stating that their request for a review was denied.
6. Click the **Assign Project** tab when you are ready to assign the review team for this project (see below).

9.5 Requesting Information from the Developers

When an **Administrator** or a **Lead Reviewer** reviews the files in a submission package, they may request information about the contents of the submission package from the **Developer**.

1. To request information from the developer, click on the **Request More Information** button located on the **Review Files** tab (see Figure 9.10). This opens a page that lists the contents of the submission package (Figure 9.11).

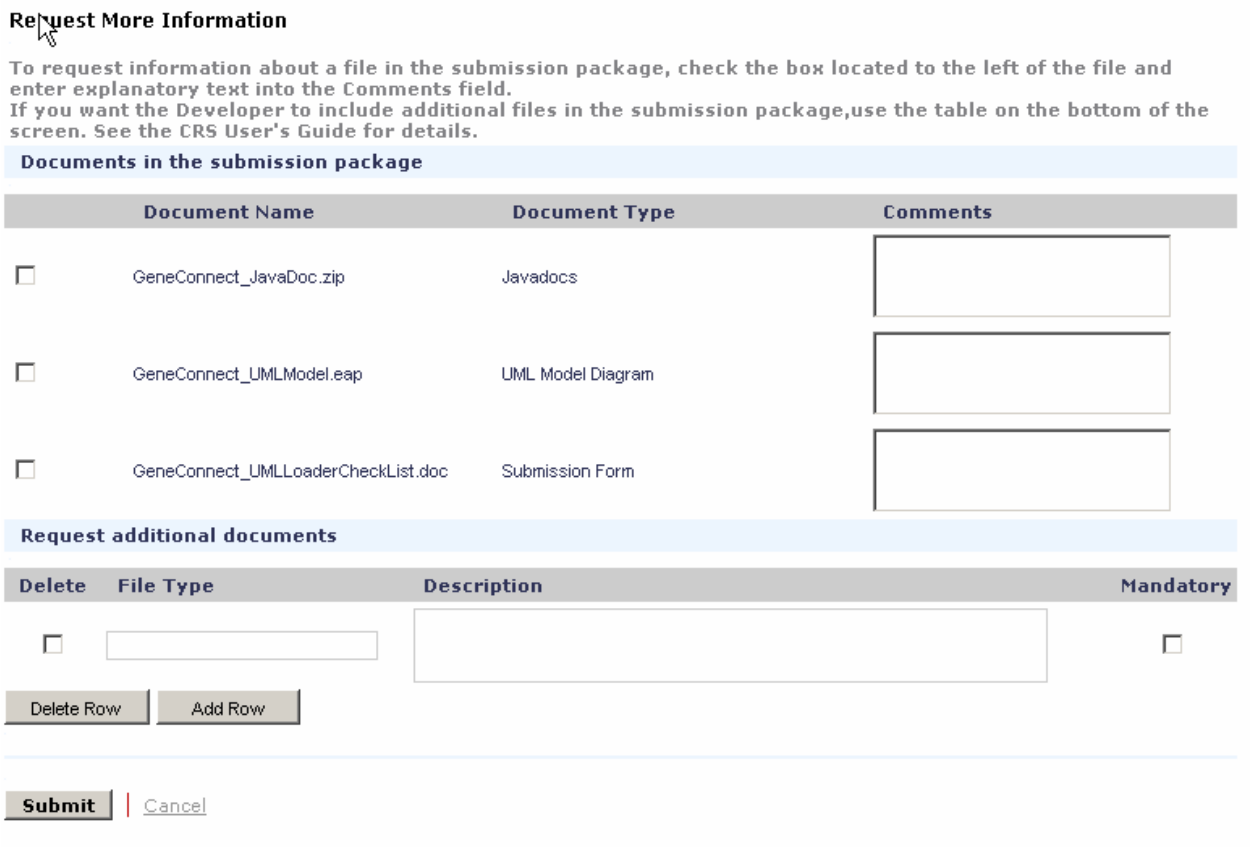


Figure 9.11: Requesting more information from a Developer about files in a submission package

2. To request information about a file in the submission package, check the box located to the left of the file and enter text into the Comments field (Figure 9.12).

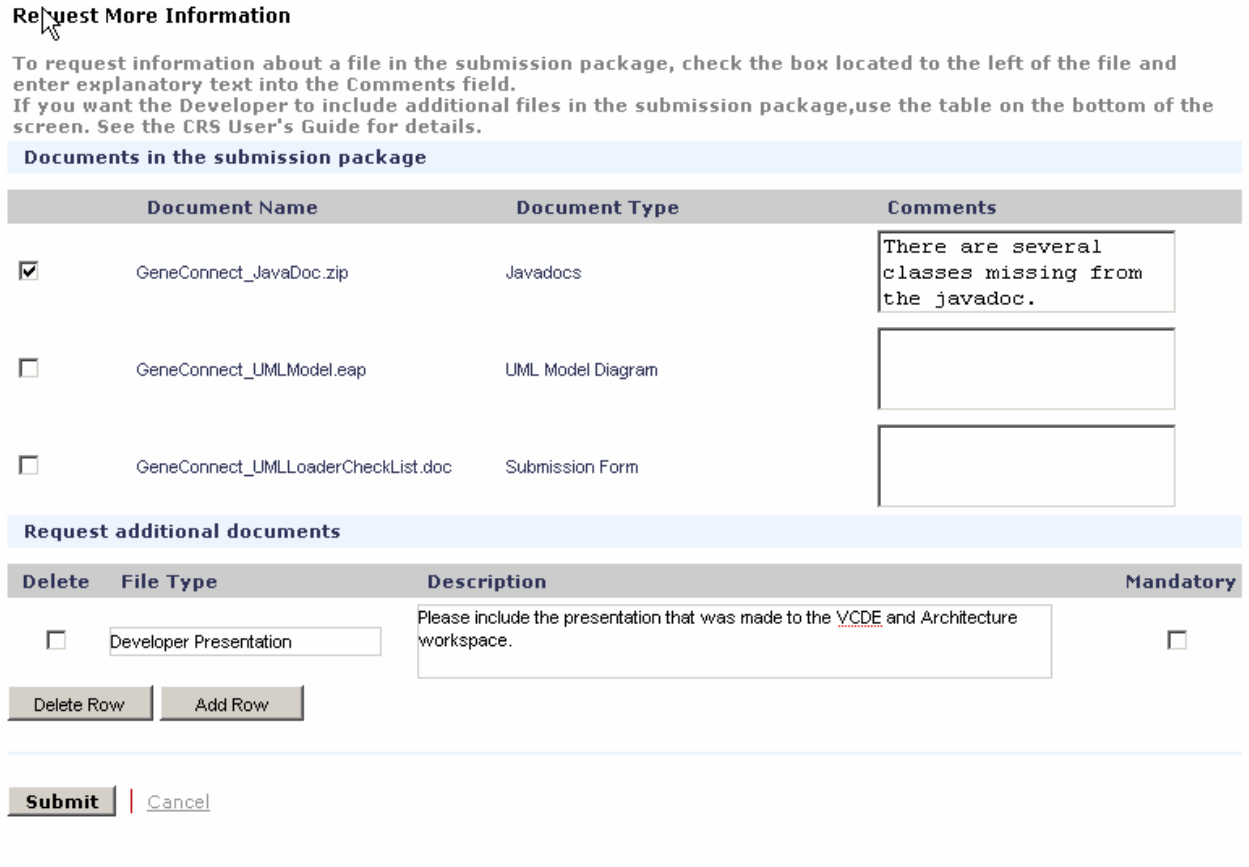


Figure 9.12: Requesting more information and an additional file for a submission package

3. If you want the **Developer** to include additional files in the submission package, use the table on the bottom of the screen. For each additional file, provide a file type and short description of what the file is so the request is clear to the **Developer**. The file can be left as optional or marked as mandatory using the column labeled "Mandatory File" (Figure 9.12).
4. Rows can be added to the table using the **Add Row** button. Rows can be deleted from the table by checking the box in the Delete column and then clicking the **Delete Row** button.
5. When you are finished, click the **Submit** button to send the information request to the **Developer**. An email will be sent to the **Developer** and the status of the project will change to "Request More Info".

9.6 Responding to a Request for Information

If a **Developer** submits a project for review and an **Administrator** or a **Lead Reviewer** requests more information about the submission package, the **Developer** must respond to the request before the review is initiated.

1. If information is requested about a submission package, the status of the project will change to "Request More Info". The **Developer** will receive an email and the

project will appear on the **Submission Packages** table (Figure 9.13), which can be accessed by clicking on the **Assemble Submission Packages** link under the **Projects** section of the navigation bar.

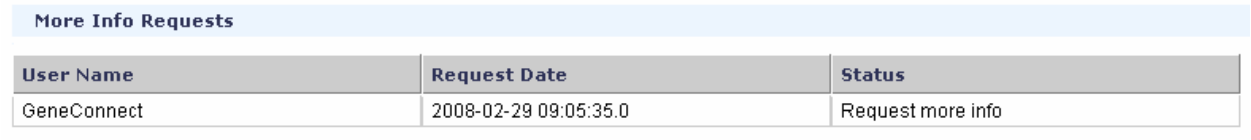


Figure 9.13: The Developer receives a request for more information about a submission package

2. Double click on the record in the table to open the **Request a Review** page, then click on the **Submission Package** tab to view the contents of the submission package. The comments from the **Administrator** or **Lead Reviewer** are displayed under the corresponding file. If an additional file is requested, it will appear in the table (Figure 9.14).

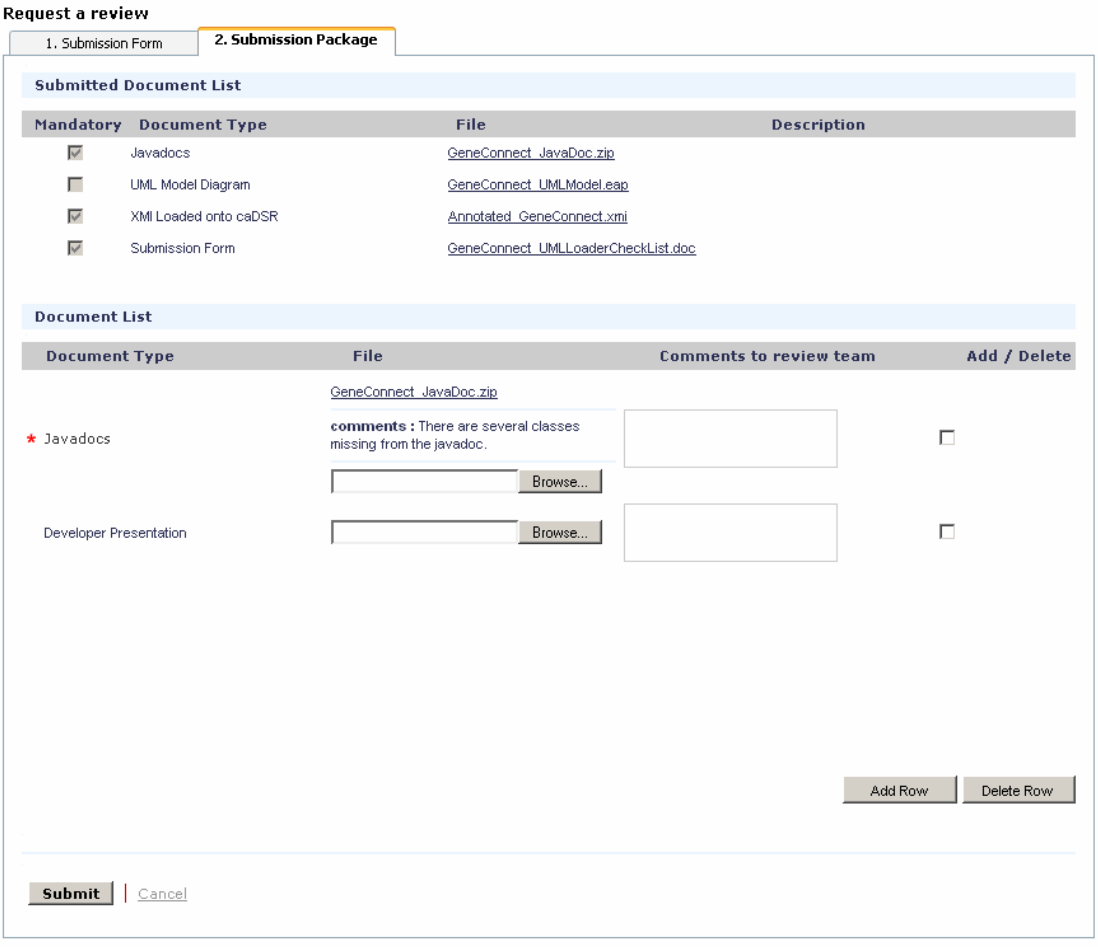


Figure 9.14: Responding to a request for more information about a submission package

3. To view a file that is part of the submission package, click the link that corresponds to the file name.

4. To replace a file in the submission package, click the **Browse** button and select the new file. You can include comments about the new file in the Comments column.
5. To remove a file from the submission package, click the "Remove File" link that corresponds to the file name.
6. When you are finished, click either the **Submit Project for Review** button (to send the submission package back to the review team) or the **Cancel** link to exit without saving your changes.

9.7 Workspace Approval

When projects funded by caBIG™ request a review, an **Administrator** can request approval from the associated **Workspace Lead**.

1. To request workspace approval, the **Administrator** should navigate to the **Create New Project** page, select a project, open the **Review Files** tab, and click the **Approval from Workspace** button (Figure 9.10). The **Workspace Lead** will be notified by email that a compatibility review has been requested for the project and will be asked to sign off on the request. The status of the project will change to "Waiting for Workspace Approval" (Figure 9.15).

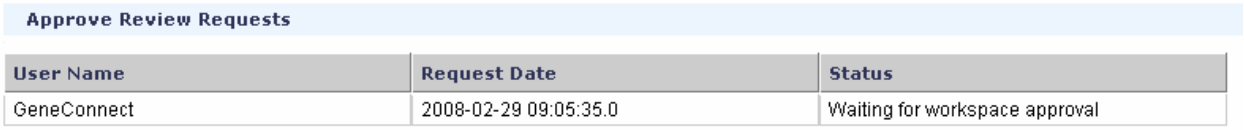


Figure 9.15: The dashboard of a Workspace Lead with a project awaiting approval

2. The project will appear on the dashboard of the **Workspace Lead**. Double click the row in the table to open the **Approve Review Requests** page.
3. The **Workspace Lead** can review the submission form (Figure 9.16) and then click on the **Review Files** tab to review the contents of the submission package (Figure 9.17).

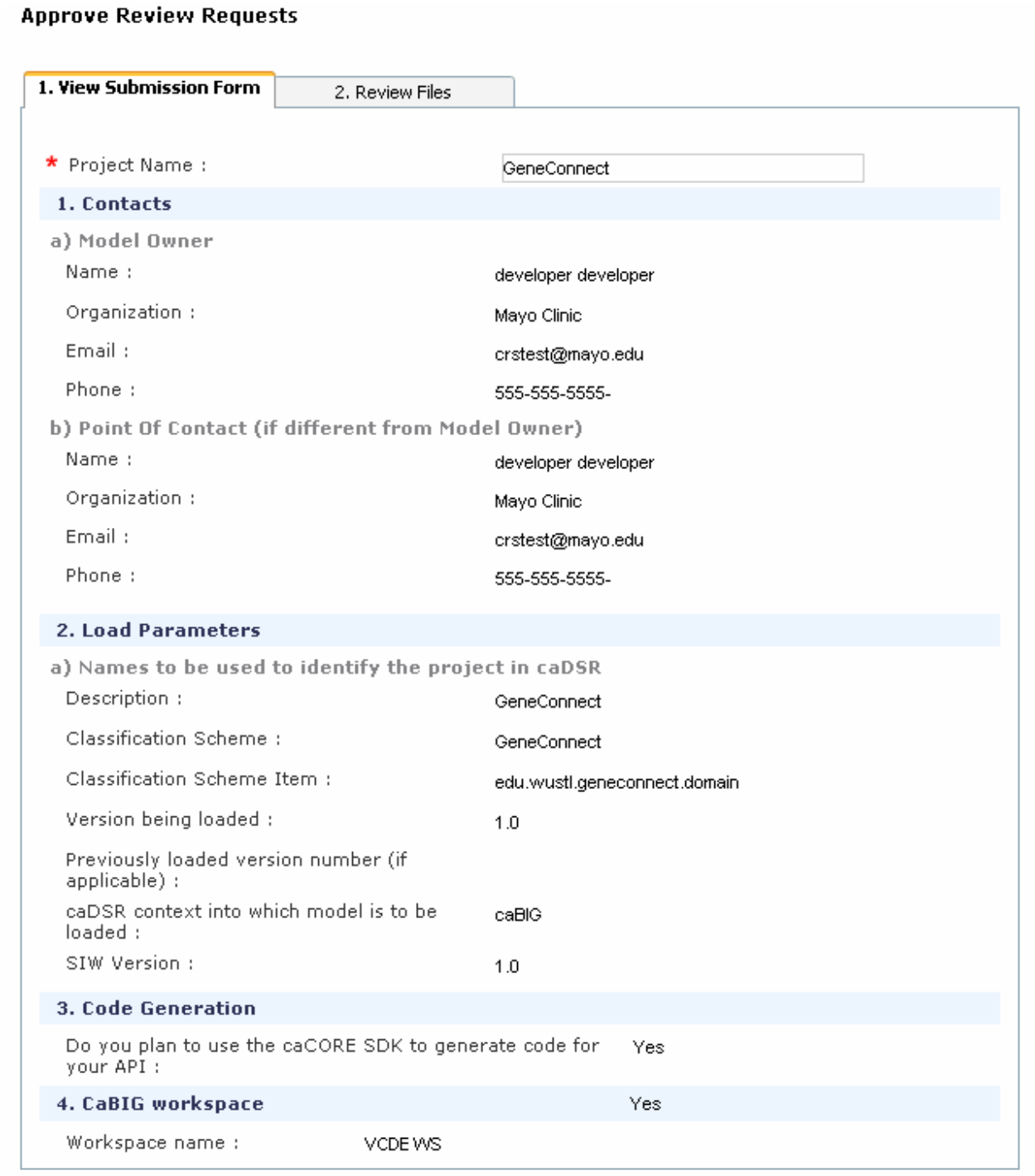


Figure 9.16: Approve Workspace page, View Submission Form tab

Figure 9.17: Approve Review Requests page, Review Files tab

4. The **Workspace Lead** may approve or deny the review request. If there is more than one **Workspace Lead** assigned to the workspace, only one is required to approve or deny the request.
    a. To allow the review to proceed, click the **Approve Review Request** button. The status of the project will change to "Workspace Approved" and the submission package will be sent back to the **Administrator** so the review team can be assigned.
    b. To prevent the review from proceeding, click the **Deny Review Request** button. This will remove the project from the **Administrator**'s dashboard and send an email to the developer informing them that the review request was denied.

9.8 Assigning the Review Team

Once a review project is created the **Administrator** must assign a review team to the project.

1. To assign a review team to a project, the **Administrator** should navigate to the **Create New Project** page, select a project, and click on the **Assign Project** tab (Figure 9.18).

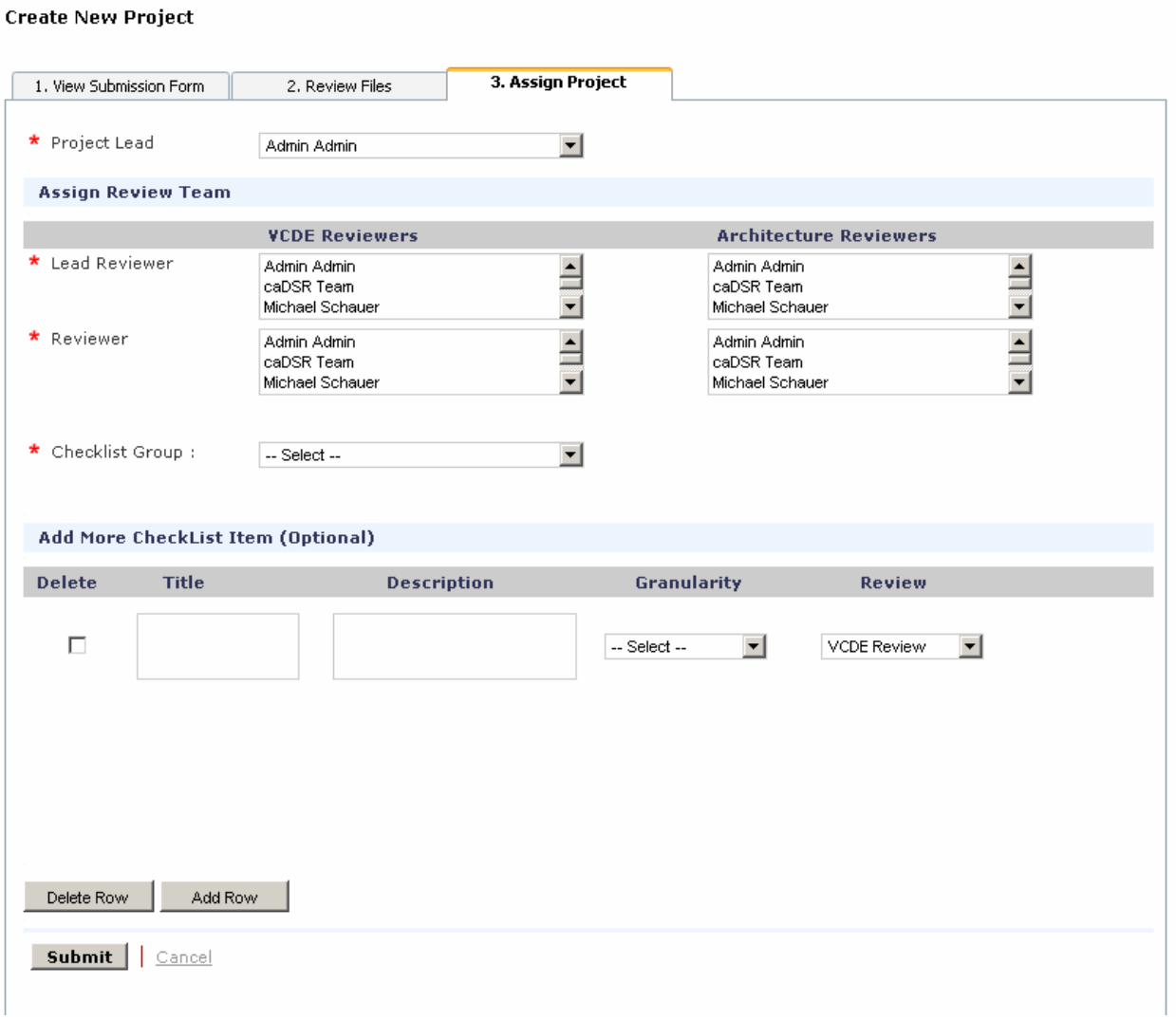


Figure 9.18: Approve Workspace page, Assign Project tab

2. Select a **Project Lead** to oversee the review team, a **Lead Reviewer** for both the VCDE and the Architecture review teams, and one or more **Reviewers** for the VCDE and Architecture review teams from the lists of registered users. Hold down the CTRL key to select multiple names.
3. Select a checklist group for the review project.

   Note: Each checklist group can contain one or more individual checklists. The **Administrator** assigns the checklist group to the review project, but the VCDE and Architecture **Lead Reviewers** are responsible for selecting the most appropriate checklist from the group for the actual review.

4. Additional items may be added to the review by entering them into the table at the bottom of the page. This could include project-specific items that are not part of the official compatibility checklist but which may be appropriate to take into consideration during the review. For example, if the application under review is

in the same subject domain as one or more other applications that have already passed a review, the **Administrator** could add an item to the review that requests that the application under review be compared to the other UML models and an estimate of the degree of harmonization between them be made.

5. Click the **Submit** button when you are finished. An email will be sent to notify the **Project Lead** that they have been assigned to the project and that they need to create and upload the round-trip XMI file.

9.9 Uploading Round-Trip XMI Files

Once an **Administrator** creates a review project and assigns the review team to it, the **Project Lead** can upload the round-trip XMI file. This step should be done immediately prior to the start of the review to ensure that the round-trip file contains all of the curations that took place on the caDSR.

1. To upload the round-trip XMI file, the **Project Lead** should select a project from the dashboard or the **Assemble Submission Packages** page. The project should have a status of "Project Created" (Figure 9.19).

Figure 9.19: Submission package request on the Project Lead's dashboard

2. Double click the project to open the **Request a Review** page. Navigate to the Submission Package tab (Figure 9.20).

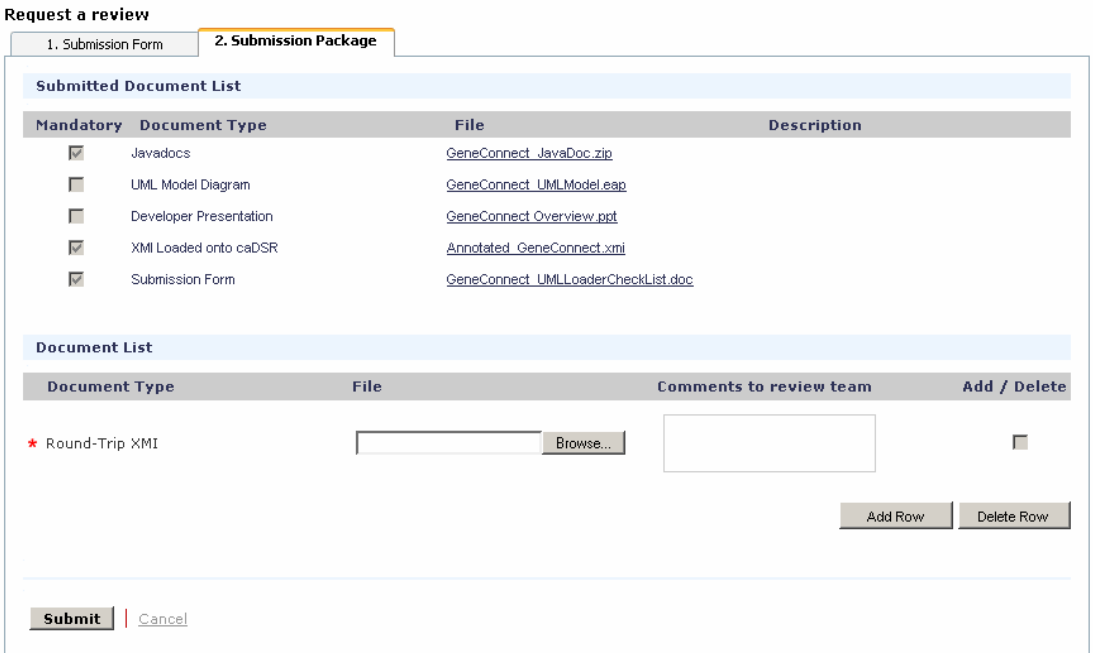


Figure 9.20: Submission package page, Project Lead

3. The top portion of the page lists all of the files in the submission package, including the XMI file that was loaded onto the caDSR. Download that file by clicking on the filename.
4. Save the file and run the Semantic Integration Workbench to create the round-trip XMI file (see the caCORE SDK Developers Guide).
5. Click the **Browse** button and specify the location of the round-trip XMI file.
6. Click the **Submit** button to upload the round-trip XMI file to the CRS. When the file is uploaded an email message will be sent to the **Lead Reviewers** and **Reviewers**, notifying them that they have been assigned to a review team. At that point the **Lead Reviewers** can log into the system to initiate the review.

9.10 Initiating Reviews

Once an **Administrator** creates a review project and assigns the review team to it, the VCDE and Architecture **Lead Reviewers** can initiate their respective reviews.

1. To initiate the review project, the **Lead Reviewer** should select a project from the dashboard or the **Initiate Project** page (Figure 9.21).

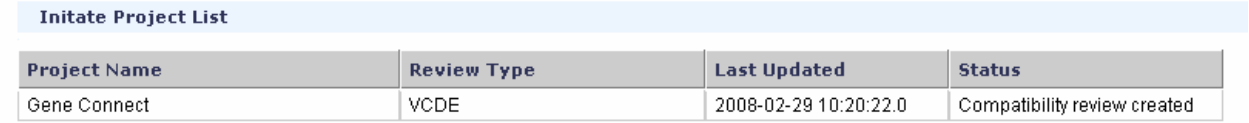


Figure 9.21: Initiate Projects table

2. Double click the project to open the **Initiate Project** page (Figure 9.22), which has four tabs.

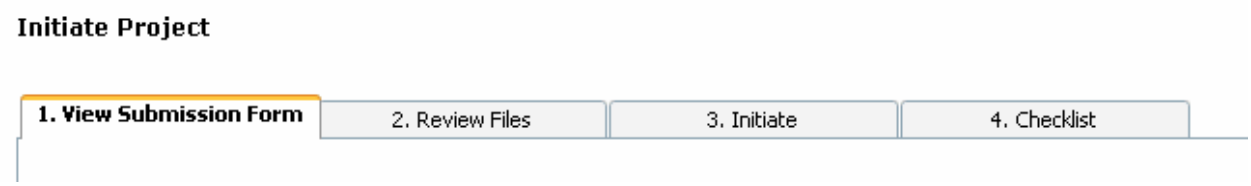


Figure 9.22: Initiate Project page

3. Review the information on the **View Submission Form** tab, which is identical to the page the **Administrator** views when creating a project (Figure 9.9).
4. The second tab, **Review Files**, contains a table that lists each file in the submission package and any comments that were included when the **Developer** uploaded the file (Figure 9.10). Each file name is a link that allows the **Lead Reviewer** to download and view the file.
5. Review the files in the submission package. If you want to request more information from the **Developer** about the content of the submission package, click the **Request More Information** button (Figure 9.10). See Section 9.5: Requesting Information from the Developers for more information.
6. The **Initiate** tab allows the **Lead Reviewer** to set the project schedule, choose the specific checklist from within the assigned checklist group that will be used for the review, and add items to the checklist that are specific to the review (Figure 9.23).

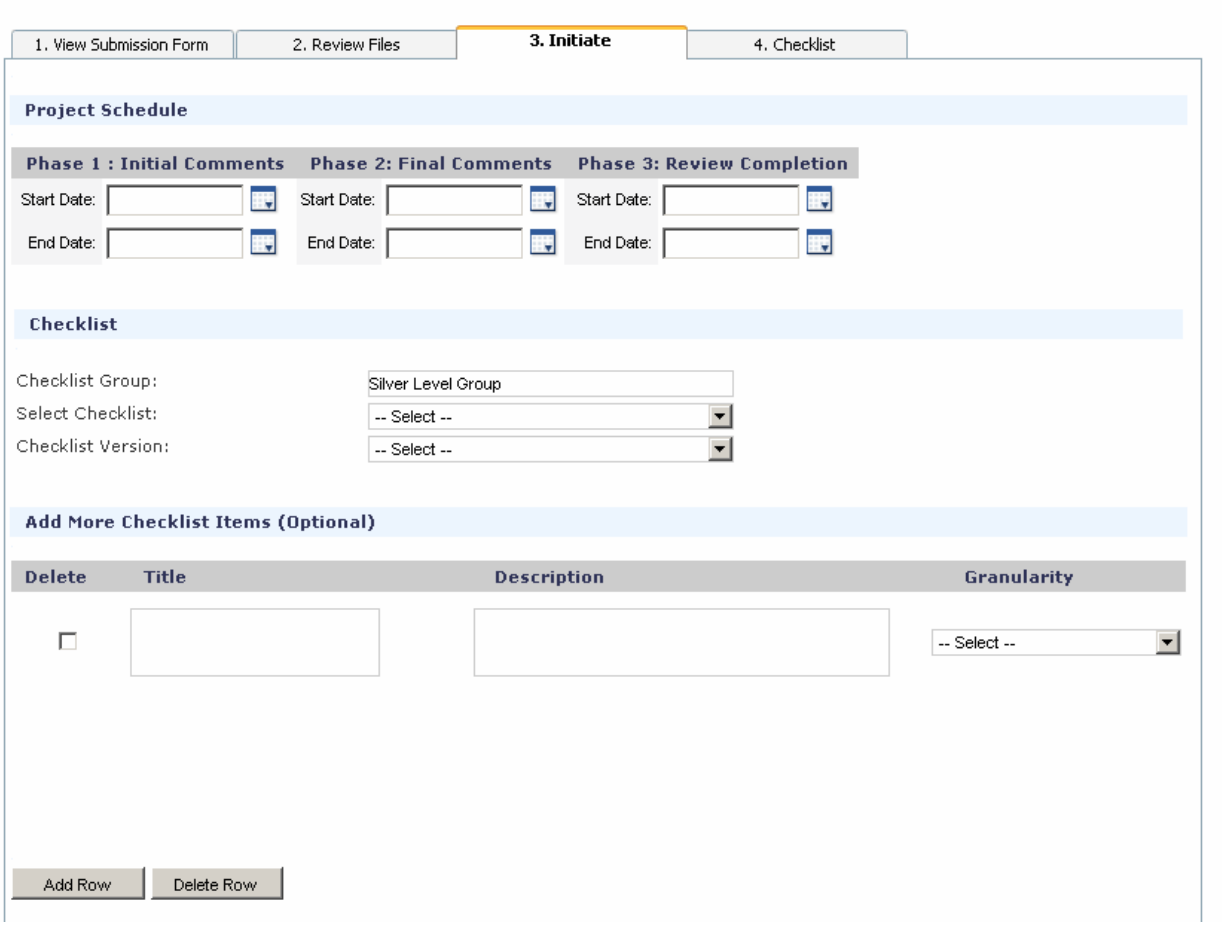


Figure 9.23: Initiate Project page, showing the project schedule, checklist selection, and table to add more items to the checklist

a. A start and end date can be provided for each of the three main phases of the review: assembling initial comments, producing final comments, and concluding the review by reviewing the draft final report.

Note: Dates can be entered manually or they can be entered using the popup calendar that is displayed by clicking the calendar icon next to each date field.

b. Additional items may be added to the review checklist by entering them into the table at the bottom of the page. This could include project-specific items that are not part of the official compatibility checklist but which may be appropriate to take into consideration during the review. See Figure 9.18 for more information.

7. The **Checklist** tab displays the checklist that was assigned to the review project by the **Lead Reviewer** on the **Initiate** tab (Figure 9.24). The checklist items are grouped by category (the subtabs) and subcategory (headers on the subtabs). The **Lead Reviewer** may use this page to "check off" items that are globally satisfied and that do not need to be reviewed for each individual CDE.

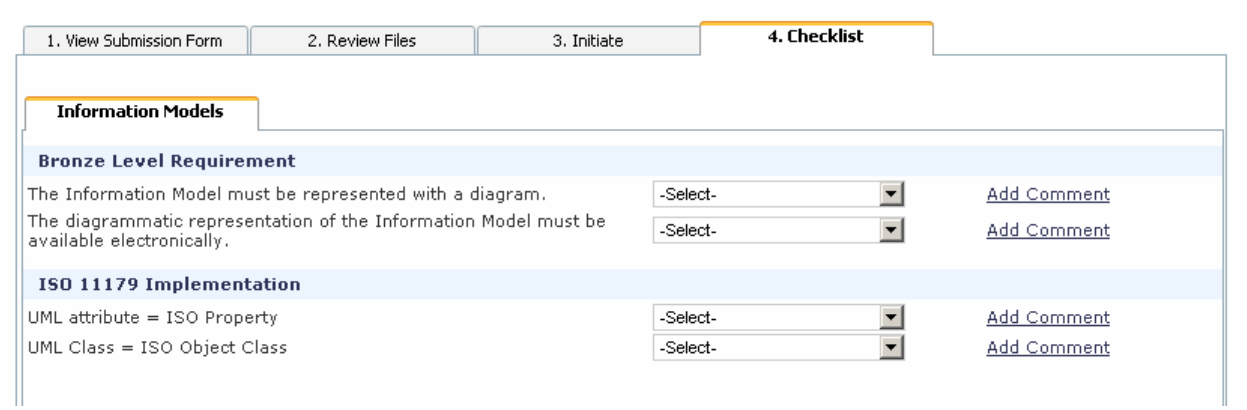


Figure 9.24: Initiate Project page, global checklist

a. For each item that you wish to answer globally (i.e., for all CDEs in the model), choose an option from the drop down menu. The options include: Yes (the criteria is met), No (the criteria is not met), and Not Applicable (the criteria does not apply to the model).
b. To add a comment for a particular checklist item, click the **Add Comment** link next to open a new window (Figure 9.25). Enter a comment into the text box and click **Submit** to save the comment or **Cancel** to discard it.

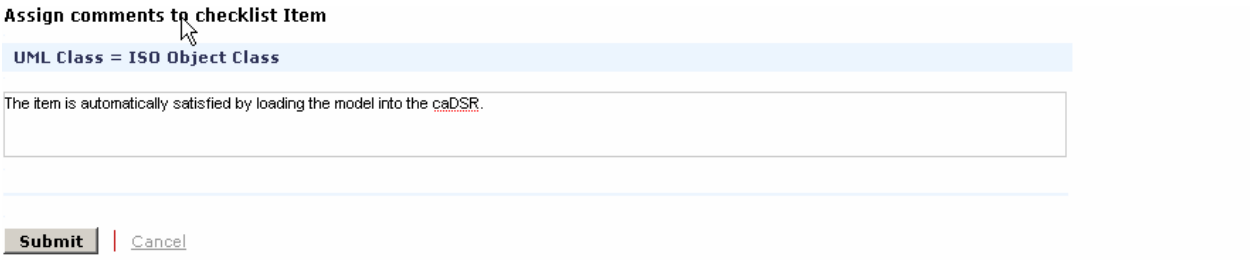


Figure 9.25: Adding a comment to a checklist item

Note: Comments that are submitted and saved will be included in the compatibility report(s) for the model.

c. If a comment is added, the **Add Comment** link will change to **Edit Comment**. Mousing over the link will activate a tooltip that displays the text of the comment (Figure 9.26).

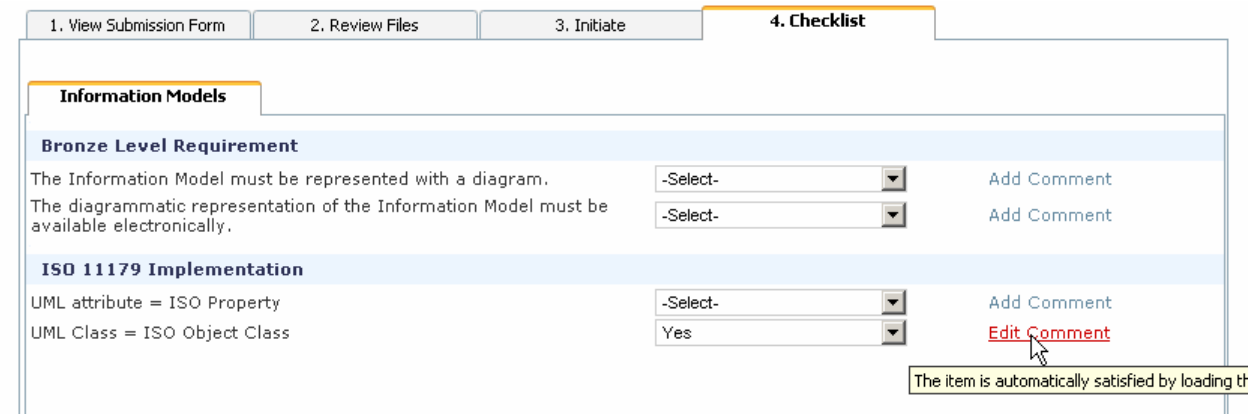


Figure 9.26: Comment text displayed as a tooltip

8. Click the **Initiate Project** button at the bottom of the page to save the information and initiate the review.
9. The system parses the XMI file and begins to download data from the caDSR. While the system is downloading data (which may take some time) the status of the project is "Loading Data".
10. When the system is done loading data the status of the project changes to "Project Initiated".

9.11 Assigning Tasks for the Review

Once a review project has been initiated, the VCDE and Architecture **Lead Reviewers** can assign tasks to each reviewer on their respective teams. This is done by assigning each CDE and association (between classes in the UML model) to one or more reviewers.

1. To assign tasks to members of the review team, the **Lead Reviewer** should select a project from the dashboard or the **Assign Tasks** page (Figure 9.27).

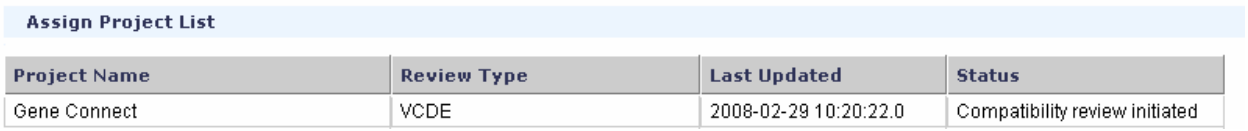


Figure 9.27: Assign Tasks table

2. Double click the project to open the **Assign Tasks** page for the project (Figure 9.28), which has three tabs.

Figure 9.28: The tabs on the Assign Tasks page

3. The **Assign CDE(s)** tab contains two columns of information (Figure 9.29). The column on the left displays a list of all of the classes and attributes in the UML model, and the column on the right is a list of all of the members of the review team.

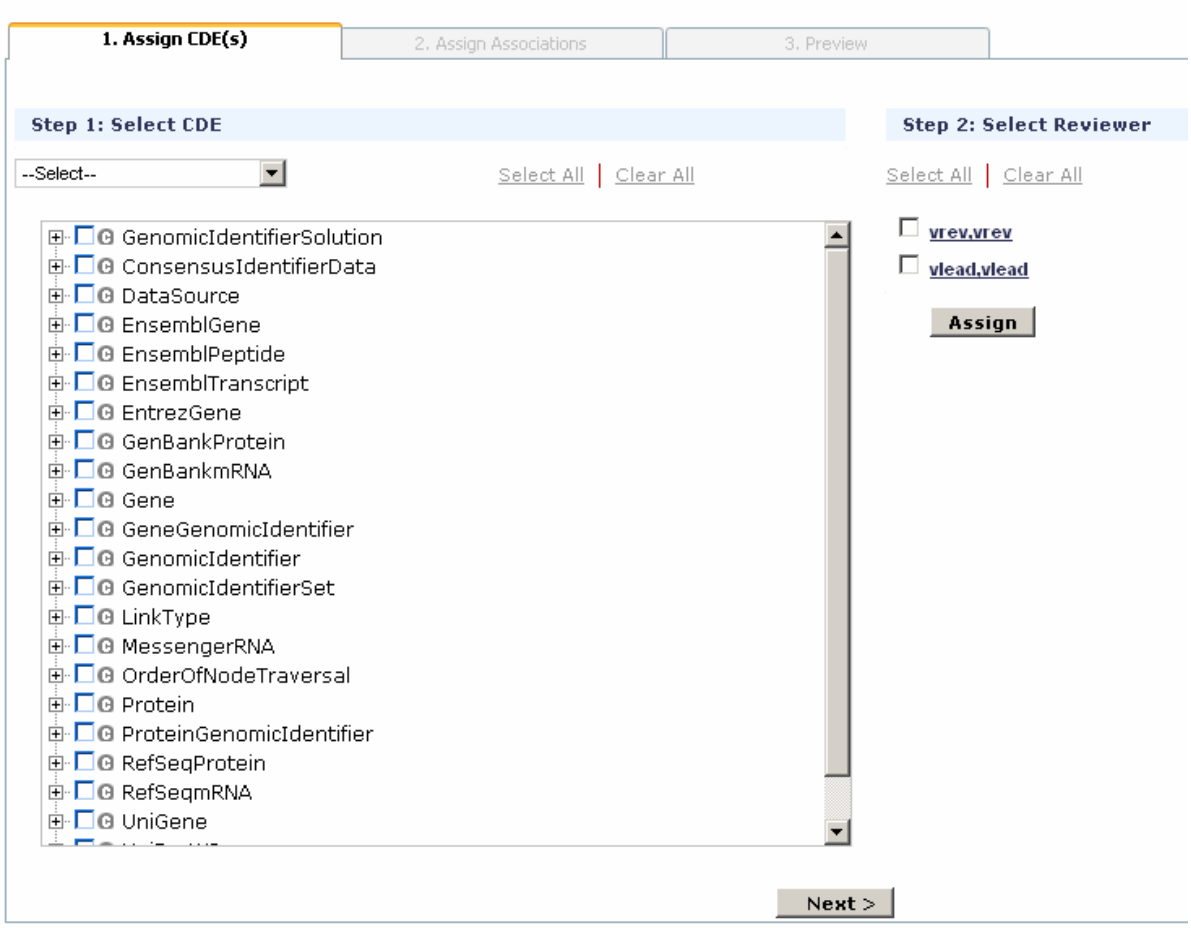


Figure 9.29: Assign CDEs page, attributes collapsed and package name hidden

a. The class/attribute list is actually a tree, such that the "plus" (or "minus") symbol next to each class name can be used to expand (or collapse) the attribute list for the class.
b. The contents of the class/attribute list can be filtered and modified using the dropdown box in the upper left corner of the frame. Selecting **Show All** displays all of the classes and attributes in the model. Conversely, selecting **Show Unassigned** displays only those classes and attributes in the model that have not yet been assigned to a member of the review team. Finally, selecting **Show/Hide Package** toggles the display of the class/attribute list to show or hide the fully qualified package name of each element (Figure 9.30), which may be useful in models that contain more than one package.

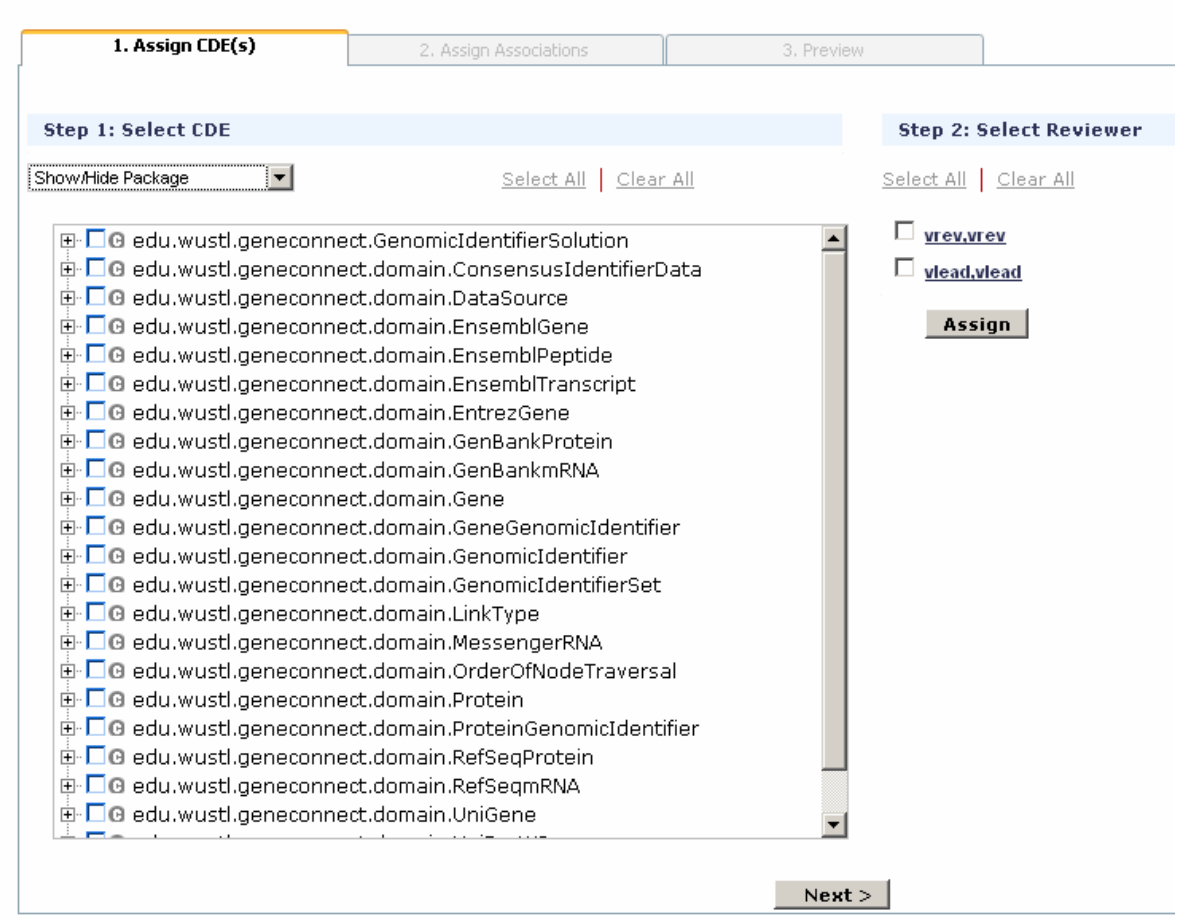


Figure 9.30: Assign CDEs page, attributes collapsed and package name shown

4. Assign tasks (CDEs) to members of the review team.
   a. Select one or more classes or attributes using the check box next to each class/attribute (Figure 9.31).

Note: When a class is selected all attributes within that class are automatically selected as well (since it is common to assign entire classes to review members, this feature acts as a shortcut). Each attribute can be selected or deselected individually, however, if more fine-grained control is desired.

b. Select one or more reviewers from the list of team members (Figure 9.31).

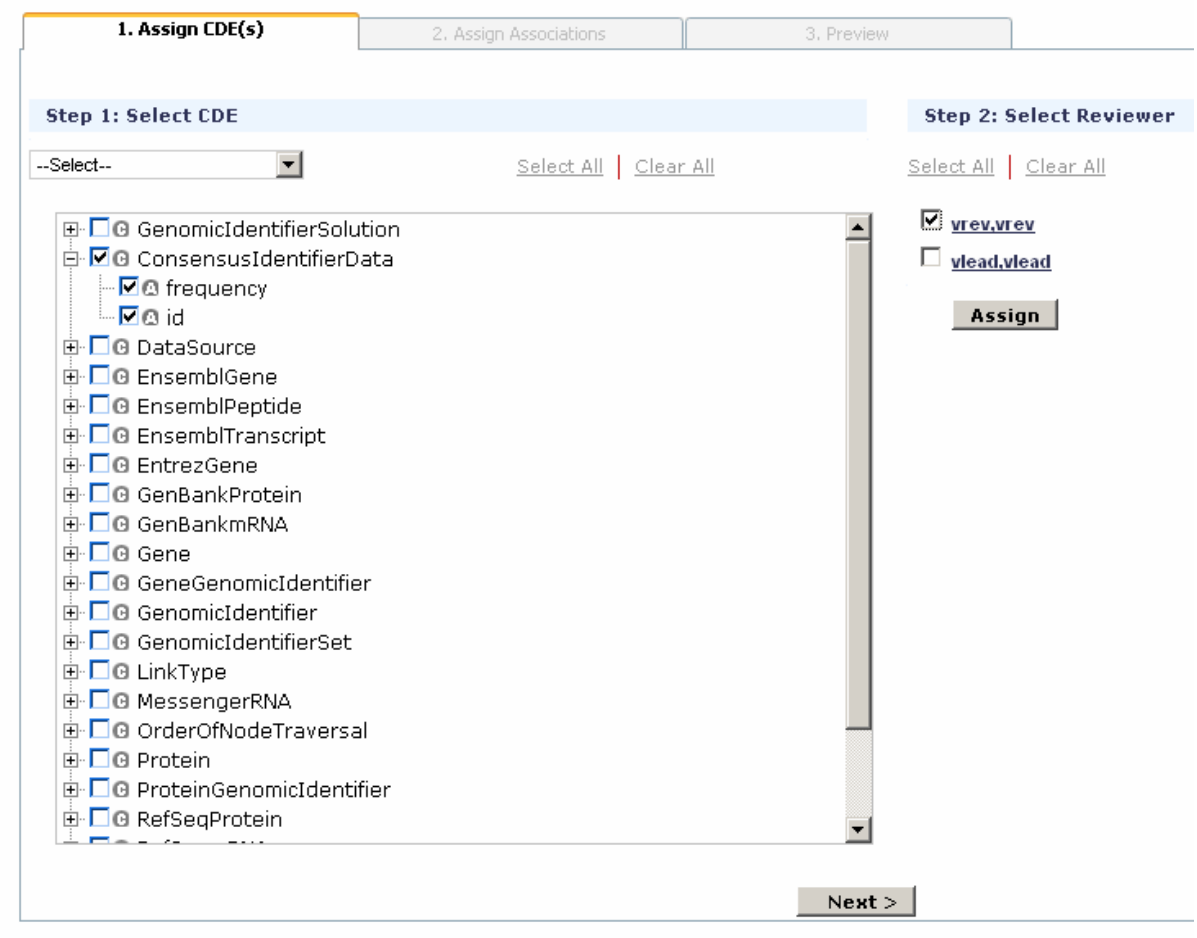


Figure 9.31: Assign CDEs page, with the attributes for one class expanded and selected

c. Click the **Assign** button.

Note: The icons next to each class and attribute indicate whether or not the element has been assigned to a reviewer. Classes and attributes that have been assigned are indicated with orange and blue icons, respectively, while those that are still unassigned are indicated with gray icons (Figure 9.32).

d. Continue assigning tasks (CDEs) to members of the review team. The **Show Unassigned** option in the dropdown menu can be used to identify classes and attributes that have not yet been assigned to a reviewer. Be sure to click the **Assign** button to save each set of assignments.
e. The elements assigned to a particular reviewer can be viewed by clicking on the name of the reviewer (all elements that have been assigned to that reviewer will be selected) (Figure 9.32). Conversely, double clicking a class or attribute in the tree will indicate which reviewer(s) were assigned to review that element.

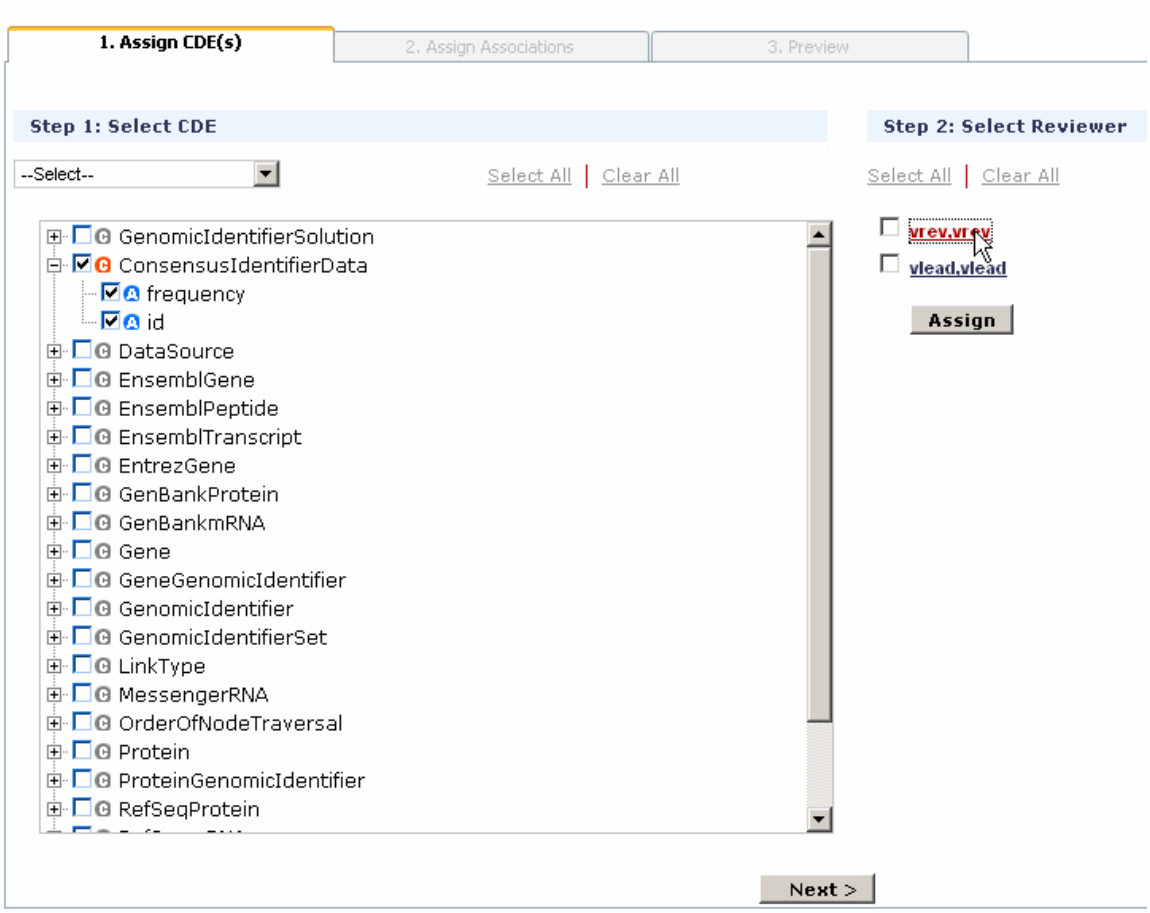


Figure 9.32: Assign CDEs page, showing the CDEs assigned to a reviewer

f. When all classes and attributes have been assigned for review, click the **Next** button to begin assigning associations.

5. Assign associations (between classes in the UML model) to members of the review team.
   a. The **Assign Associations** tab is organized similarly to the **Assign CDE(s)** tab. The left column contains a table that lists all of the associations in the UML model, and the right column contains a list of team members (Figure 9.33).

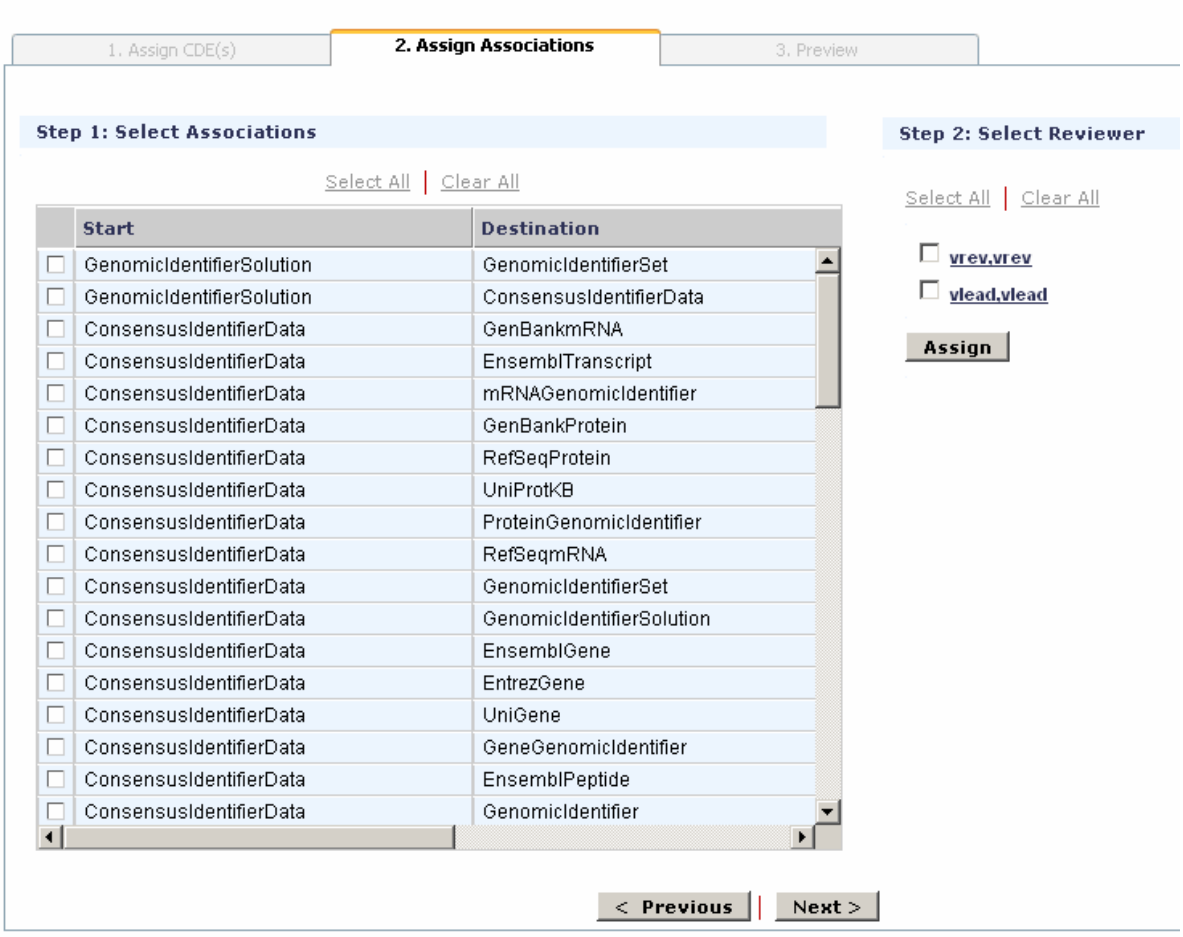


Figure 9.33: Assign Associations page

b. The associations table lists, for each association, the name of the source class ("Start"), the name of the target class ("Destination"), and the role names for the ends of the association (attached to the source and target classes).
c. By default, associations are automatically assigned to reviewers based on the CDE assignments. Specifically, reviewers are assigned all associations that start or end at one of their assigned classes.

Note: Since all associations are assigned by default, you can skip this page unless you want to manually reassign associations to different reviewers. To go to the next page, click the **Next** button.

d. The associations assigned to a particular reviewer can be viewed by clicking on the name of the reviewer (all associations that have been assigned to that reviewer will be selected) (Figure 9.34). Conversely, double clicking a row in the table will indicate which reviewer(s) were assigned to review that association.

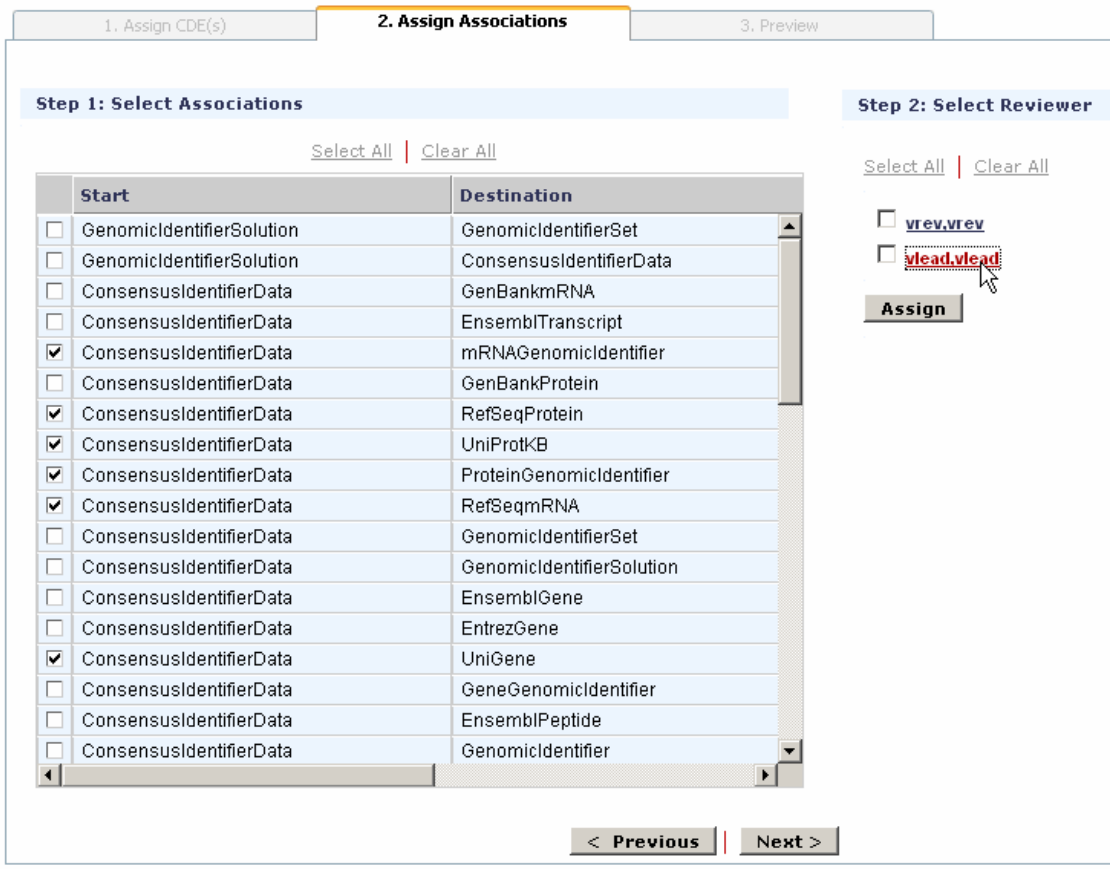


Figure 9.34: Assign Associations page, showing the associations assigned to a reviewer

e. Associations may be reassigned manually by changing the items selected by default. Click the **Assign** button to save the changes.
f. When all associations have been assigned for review, click the **Next** button to review all of the assignments.

6. The **Preview** tab contains a table that lists the number of CDEs and associations that were assigned to each reviewer (Figure 9.35). This table allows the **Lead Reviewer** to ensure that the review tasks were distributed evenly among the reviewers.

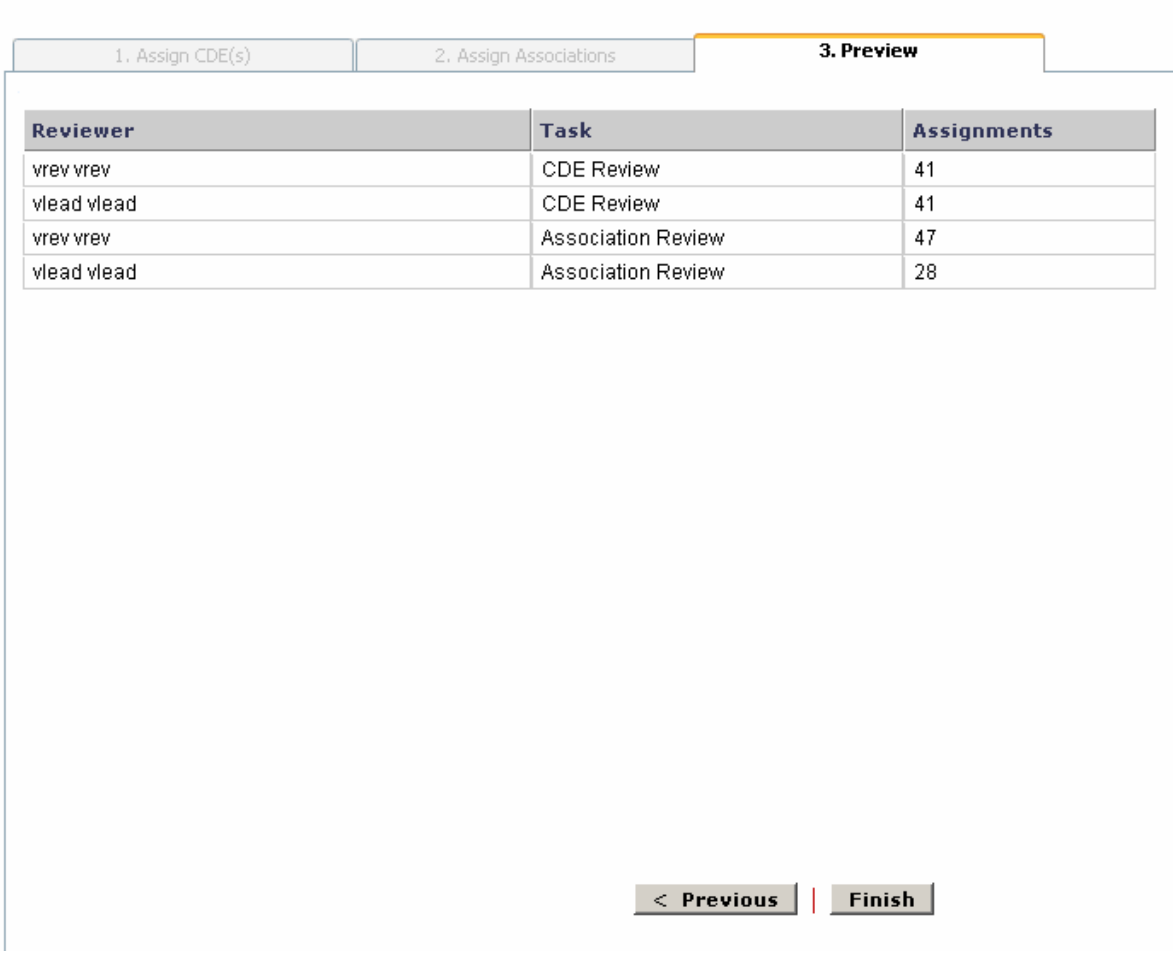


Figure 9.35: Preview Assignments page

7. Click the **Finish** button to save the task assignments to the system. An email notice will be sent to each reviewer that informs them that they have been assigned tasks for a review project, and the project will appear on the reviewers' dashboards when they log in.

Chapter 10: Performing a Review

This chapter reviews the tasks associated with performing a review.

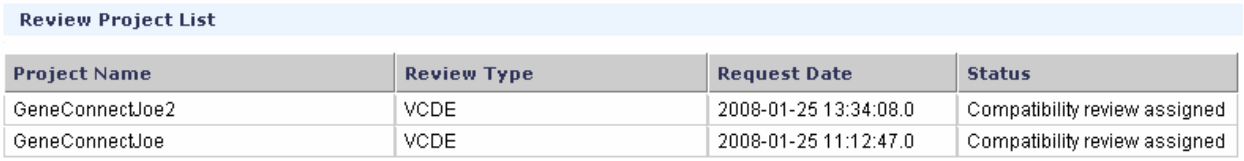
The following topics are covered in this chapter:

Reviewing the Model

10.1 Reviewing the Model

Once a review project has been initiated and tasks have been assigned, the **Reviewers** can review the model.

1. To review a model, the **Reviewer** should select a project from the dashboard or the **Project Review** table (Figure 10.1).



Review Project List

Project Name	Review Type	Request Date	Status
GeneConnectJoe2	VCDE	2008-01-25 13:34:08.0	Compatibility review assigned
GeneConnectJoe	VCDE	2008-01-25 11:12:47.0	Compatibility review assigned

Figure 10.1: Project Review table

2. Double click the project to open the **Project Review** page. There are four main sections of the user interface (Figure 10.2):

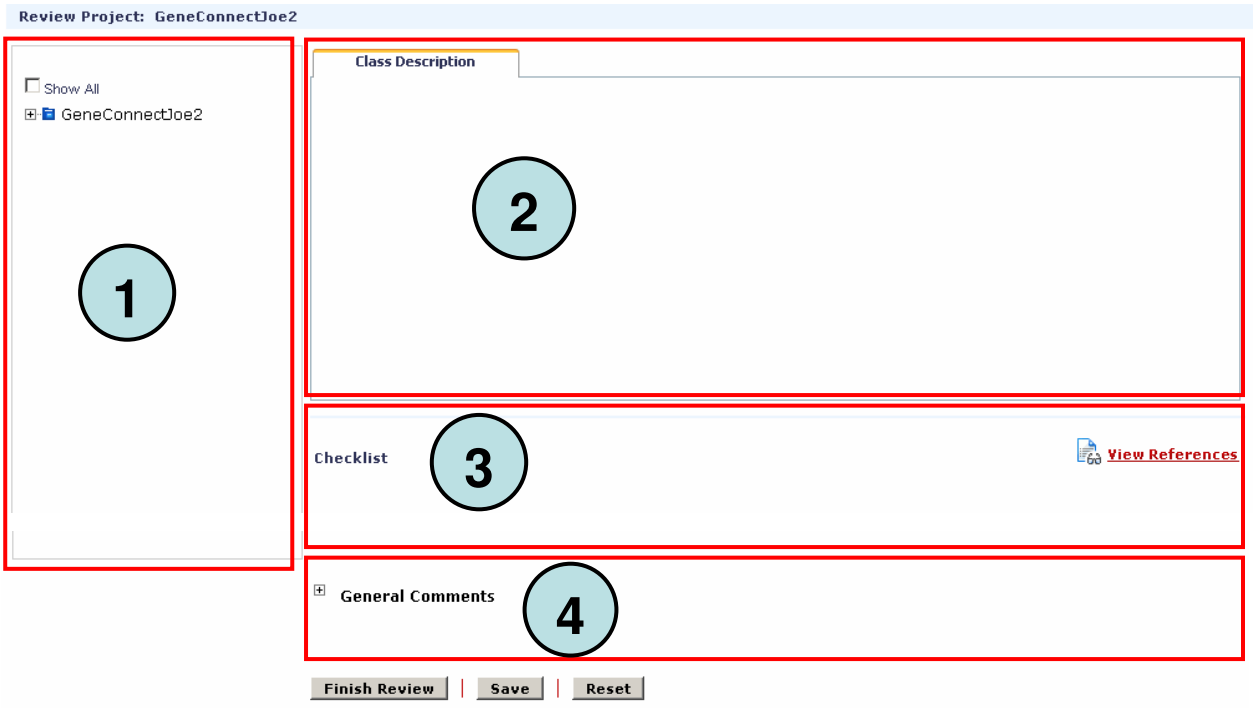


Figure 10.2: Project Review page, with annotations (see text for details)

1. The model elements assigned to you, displayed in a heirarchical tree (Figure 10.3). The **Show All** check box toggles the display to show or hide all of the elements in the model, regardless of who the elements are assigned to for the review.

Note: The icons next to each element name indicate if the element is assigned to the reviewer (orange icons for classes, blue icons for attributes and associations) or assigned to a different reviewer (gray icon).

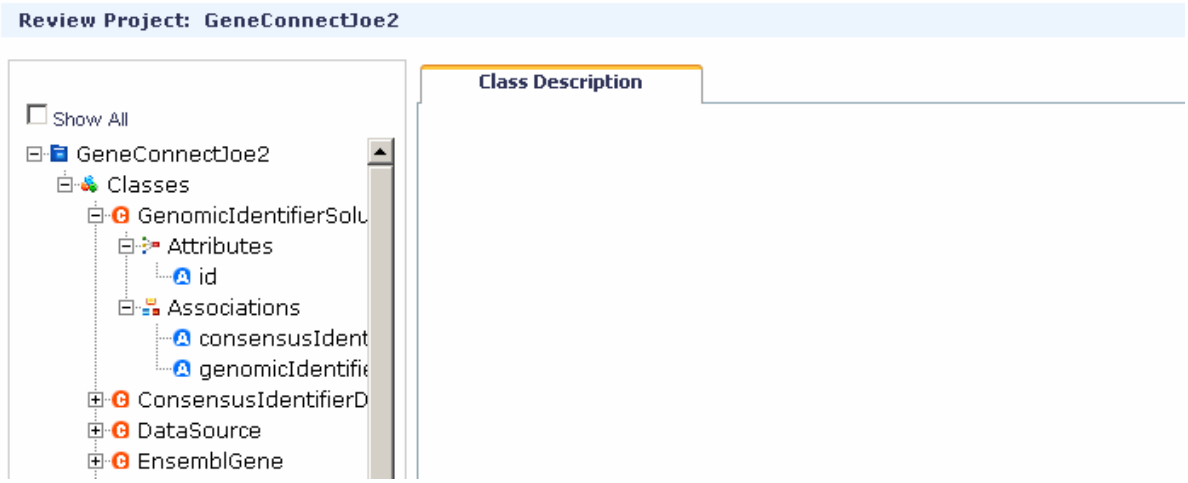


Figure 10.3: Project Review page, showing the structure of the model element list

2. The data detail frame, which is where the data for the selected model element will be displayed.
3. The review checklist, including custom items that were added by the **Administrator** or the **Lead Reviewer** during project creation and initialization. Only the checklist items that pertain to the selected element (based on the granularity setting) are displayed. The checklist items are grouped according to category (tabs) and subcategory (headers). This section also contains a link called **View References**, which opens a new window that displays the references that have been added to the system (see section 6.1: Adding and Viewing References).
4. The general comments section (hidden in Figure 10.2), which can be used to attach a comment to a model element without associating it to a specific checklist item. This section is usually hidden to leave more vertical space for other sections. It can be expanded by clicking on the + symbol located in the upper left hand corner of the section.

3. There are three buttons on the **Project Review** page (Figure 10.2):
    a. The **Save** button will save all of the responses from the current session to the system's database. Click the **Save** button before leaving the **Project Review** page or recent entries will be lost.
    b. The **Reset** button will reset (clear) all responses for the selected model element.
    c. The **Finish Review** button is used to finalize all of the responses and comments for the review project; once this button is pressed the responses will no longer be editable. All assigned tasks must be completed before this button is pressed or an error message will be displayed.
4. To review a model element (class, attribute, or association), expand the element list as needed and select one for review (Figure 10.4). The UML and/or CDE information will be displayed in the data detail frame.

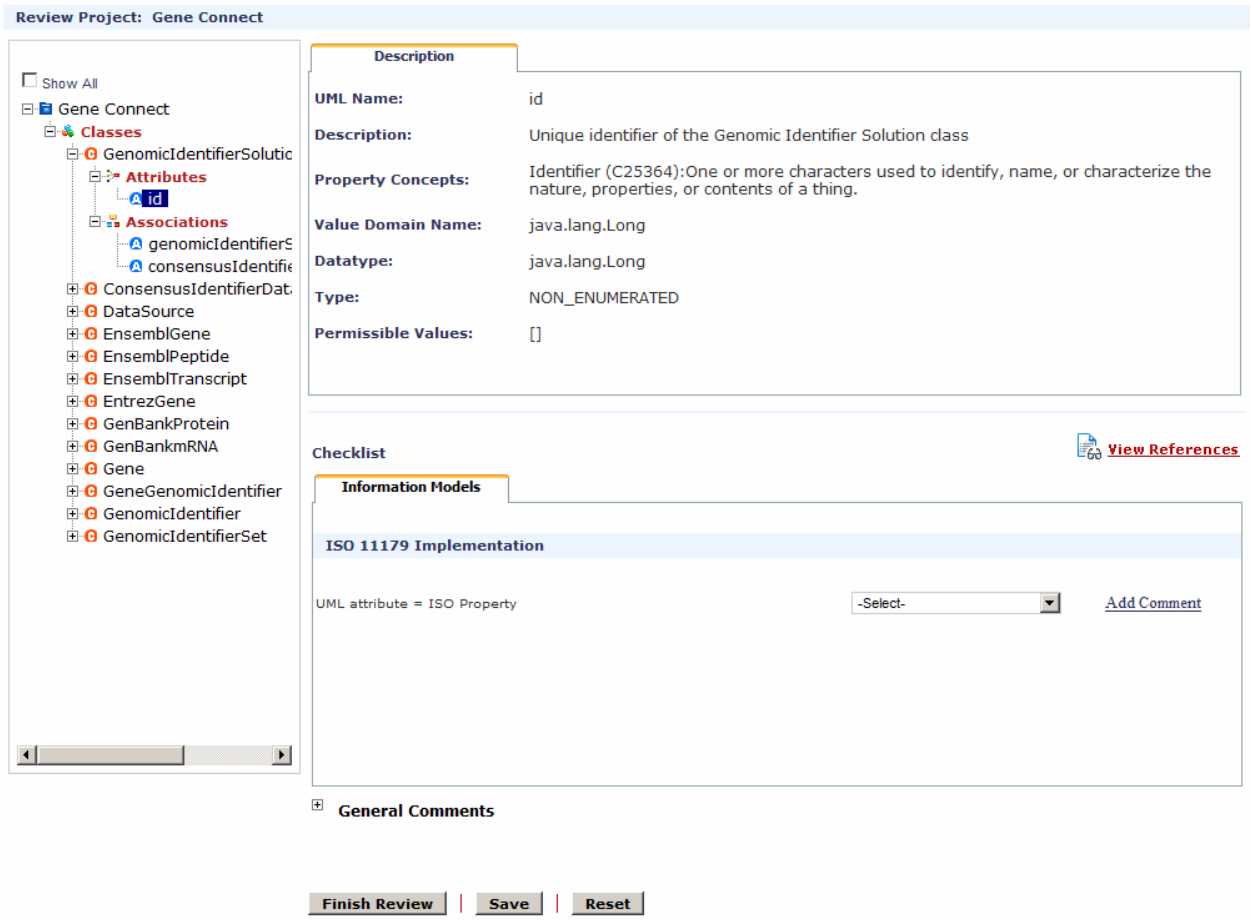


Figure 10.4: Project Review page, reviewing an attribute/CDE

a. Review the information provided about the element using the items displayed in the checklist section. For each checklist item, select a response from the dropdown menu after determining if the attribute/CDE does (Yes) or does not (No) meet the criteria. If the item does not apply, select "Not Applicable".
b. To add a comment for a particular checklist item (e.g., if the criteria was not met), click the **Add Comment** link located next to the dropdown menu to open a new window (Figure 10.5). Enter the comment into the text box and click the **Submit** button to save the comment and close the window. Click the **Cancel** button to discard the comment.

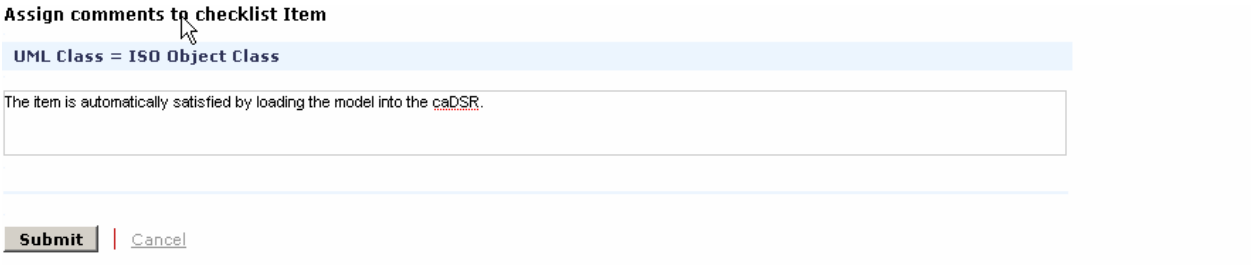


Figure 10.5: Project Review page, adding a comment to a checklist item

c. Provide a response to all checklist items for all assigned elements. Note that there may be more than one tab in the checklist section (Figure 10.4).
d. To add a general comment about the attribute/CDE, which is not associated with a particular checklist item, enter the comment into the **General Comments** text box located below the checklist section (Figure 10.6).

Note: By default, the text box in the **General Comments** section is hidden to save space. To expand it, click the + symbol located in the upper left hand corner of that section.

Figure 10.6: Project Review page, adding a general comment

5. Architecture reviewers can access the JavaDocs for the application under review by clicking on the "JavaDoc" tab located next to the detail frame (Figure 10.7).

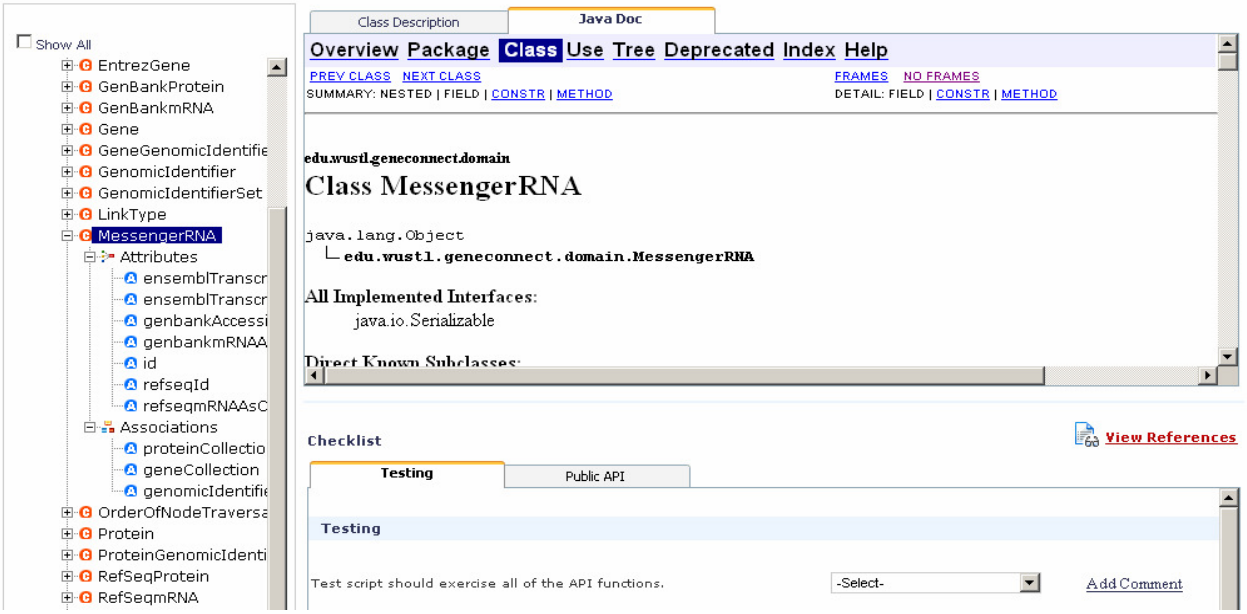


Figure 10.7: Project Review page, reviewing an association

6. Click the **Save** button to save your responses to the system's database. You may continue the review later.
7. When all checklist items have been answered for all model elements that have been assigned to you, click the **Finish Review** button. This will finalize all of your responses and comments for the review project; once this button is pressed the responses will no longer be editable. All assigned tasks must be completed before this button is pressed or an error message will be displayed.

Chapter 11: Concluding a Review

This chapter reviews the tasks associated with concluding a review.

The following topics are covered in this chapter:

Generating Reports
Uploading Project Files
Downloading Project Files

11.1 Generating Reports

Once all of the reviewers have finished their review and submitted their comments, reports can be generated for the review project. Interim reports can also be generated before the review is complete.

1. To generate a report, navigate to the **Generate Report** page (Figure 11.1).

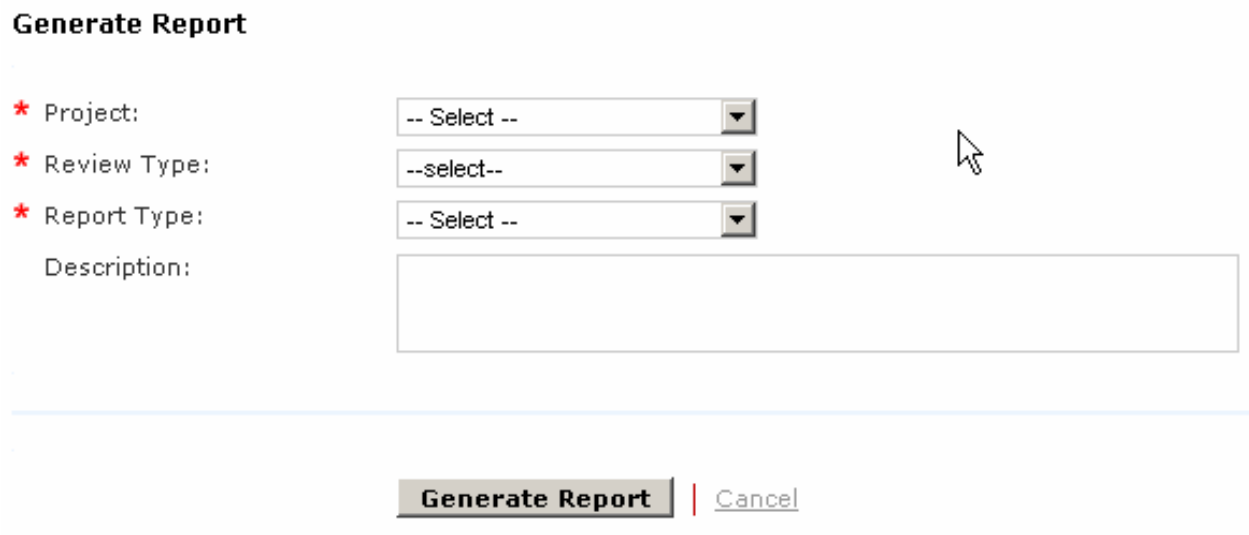


Figure 11.1: Generate Report page

2. Select a review project from the **Project** drop down menu.
3. Select the type of review (VCDE or Architecture) for which to generate the report.
4. Select a report template from the **Report Type** drop down menu.

Note: Currently, only two report types are provided: the detail report and the overview report. The detail report contains all of the comments from all of the reviewers, aggregated by class and attribute. The overview report

contains all of the comments from all of the reviewers, aggregated by checklist item.

5. Enter a description for the report in the text box, if desired.
6. Click the **Generate Report** button. The report will be generated and added to the **Report List** table at the bottom of the page (Figure 11.2).

Figure 11.2: Generate Report page, table of generated reports

7. To download a generated report, click on the link in the Report Type column. This will open a dialog box that will allow you to save the file, which can be edited offline. When the report has been finalized, it can be uploaded to the CRS and saved with the rest of the review files.

11.2 Uploading Project Files

The **Review Project Lead**, **Lead Reviewers**, and **Administrators** can upload files and save them as artifacts of the review. This could include supplemental documentation provided by the developer, records of correspondence that summarize issues raised and resolved, and final reports from the review team.

1. To upload a file to the CRS and save it as part of the review, navigate to the **Upload Project Files** page (Figure 11.3).

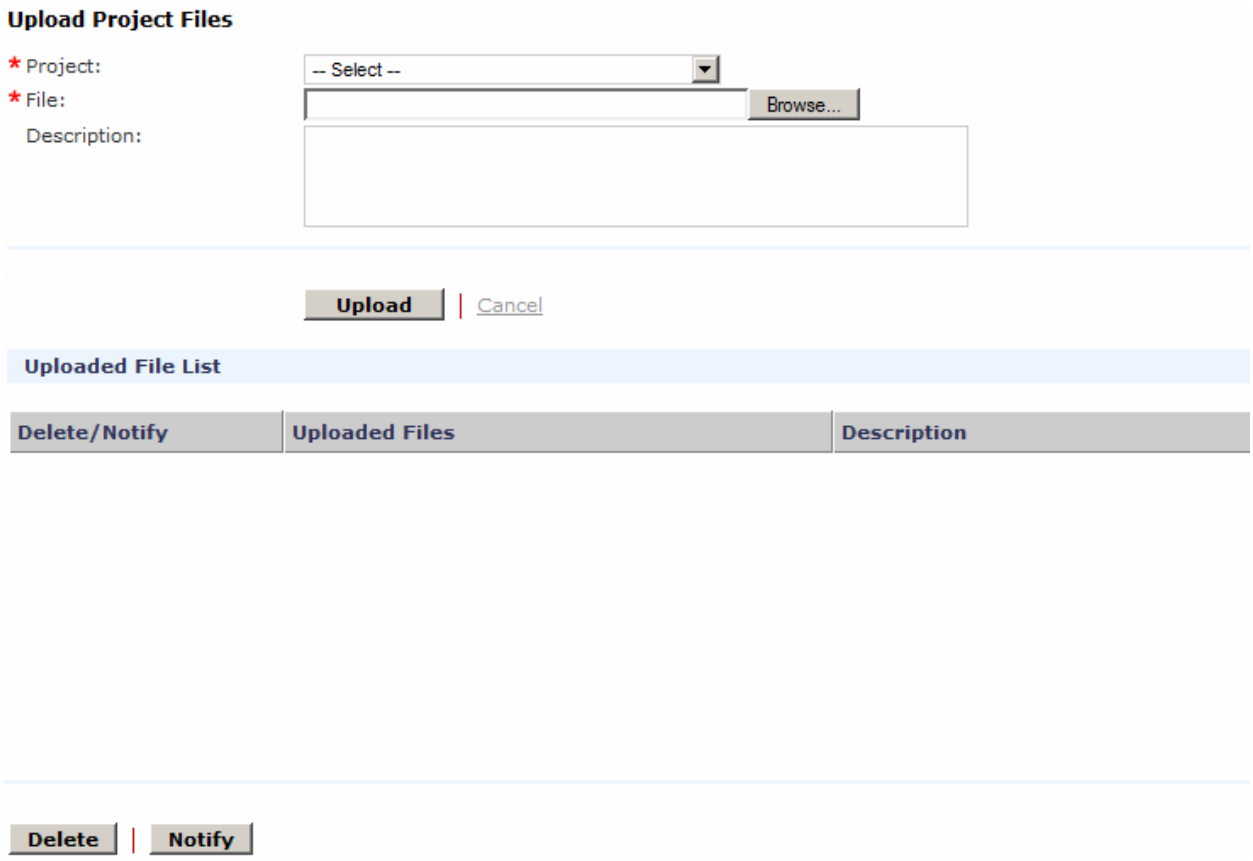


Figure 11.3: Upload Project Files page

2. Select a project from the Project drop down menu.
3. Click the **Browse** button to open a window that allows you to specify the location of the file that you wish to upload to the system.
4. Enter a description for the file, if desired.
5. Click the **Upload** button to upload the file, or click the **Cancel** link to cancel the upload and return to your dashboard.
6. Files that have been uploaded to the system appear in the **Uploaded File List** table located at the bottom of the page (Figure 11.4). Files in that table may be downloaded or deleted from the project archive.
    a. To download a file, click on the filename link in the Uploaded Files column. This will open a dialog box that will allow you to save the file.
    b. To delete a file from the list, select the check box that corresponds to the file and click the **Delete** button. A confirmation dialog box will appear and, if confirmed, the file will be deleted from the table.

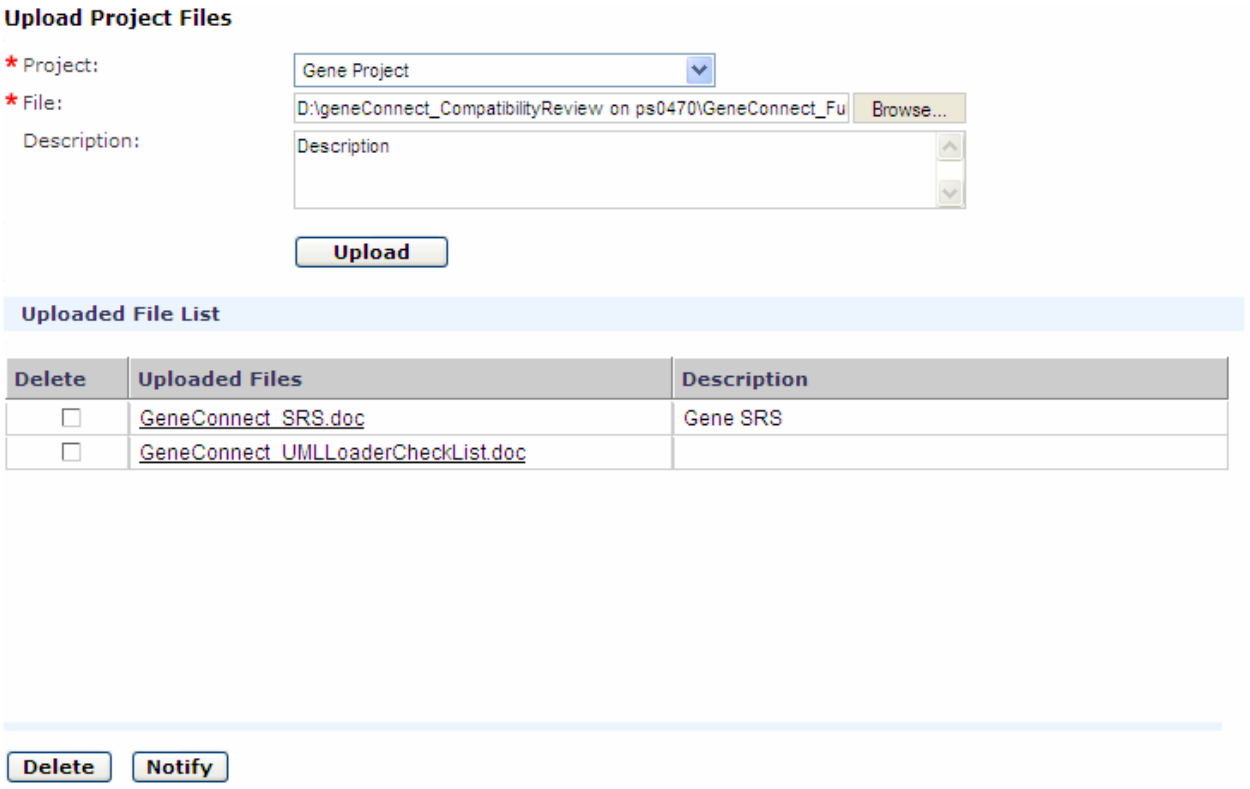


Figure 11.4: Upload Project Files page, including the uploaded file list table

7. A notification can be sent to different user groups to inform them that a file is available for access. To notify a group of users, select the check box that corresponds to the file and click the **Notify** button, which will open a new window (Figure 11.5).

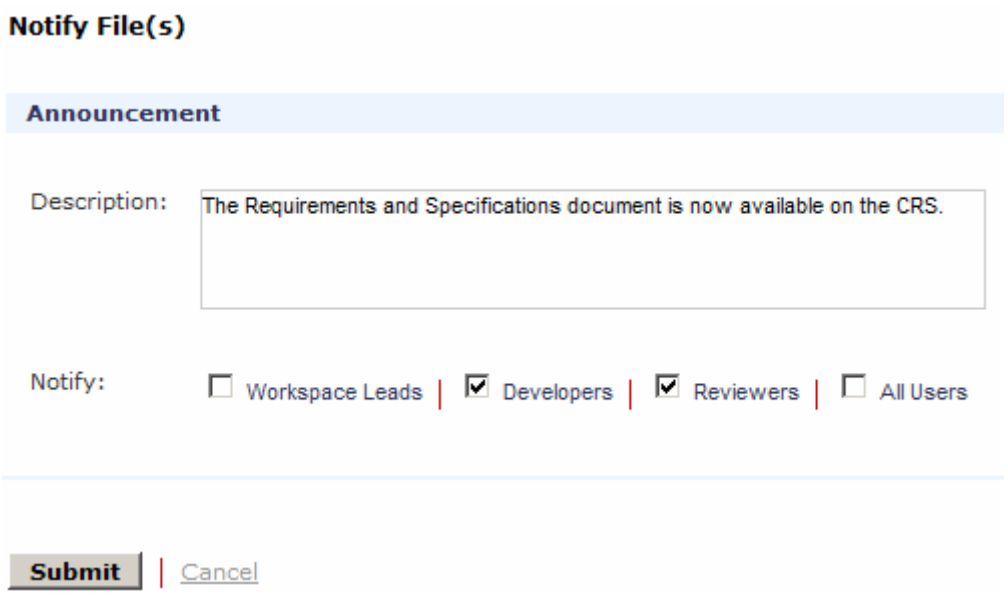


Figure 11.5: The file notification window

8. Enter a brief message in the text box and then select the user groups that should be notified (via email using the address registered on the CRS). Click **Submit** to send the notification or **Cancel** to exit without sending.

   Note: The file notification process also provides some control over who is allowed to access each file. If Workspace Leads, Developers, or Reviewers are selected only the selected groups will be able to access the file. If All Users is selected then anyone associated with the review project (but only those people that are associated with the project) can access the file, but no email notification is sent. Improved notification and access permissions will be incorporated in a future development cycle.

11.3 Downloading Project Files

Users can access files that were uploaded to the system by an **Administrator**, **Review Project Lead**, or **Lead Reviewer**.

1. To download a file navigate to the **Download Project Files** page (Figure 11.6).

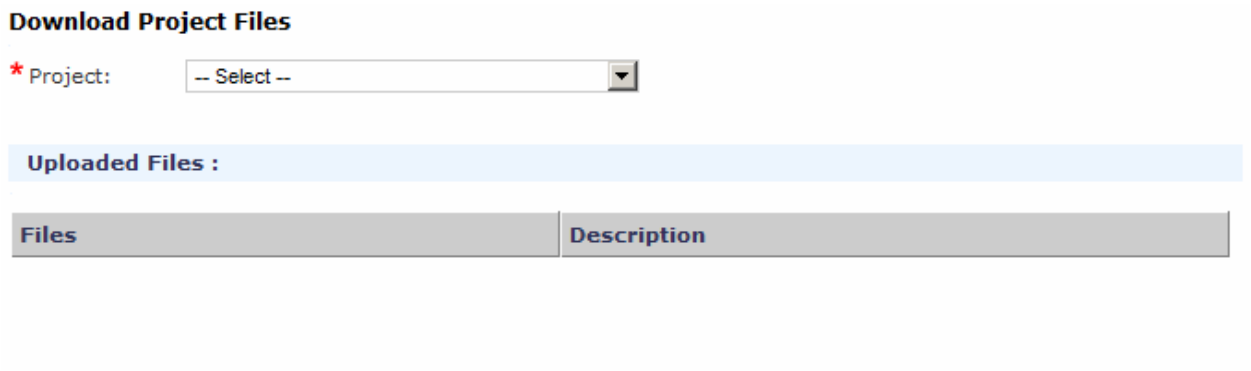


Figure 11.6: Download Project Files page

2. Select a project from the drop down menu. The Uploaded Files table will list all of the files that have been uploaded as part of that review project (Figure 11.7).

   Note: The Uploaded Files table will contain only those files that were manually uploaded to the system. Reports that were generated via the Generate Report page will not be shown in this table (use the Generate Report page to access those files).

   Note: Uploaded files are only accessible to users that were included in the notification list (see Section 11.2: Uploading Project Files).

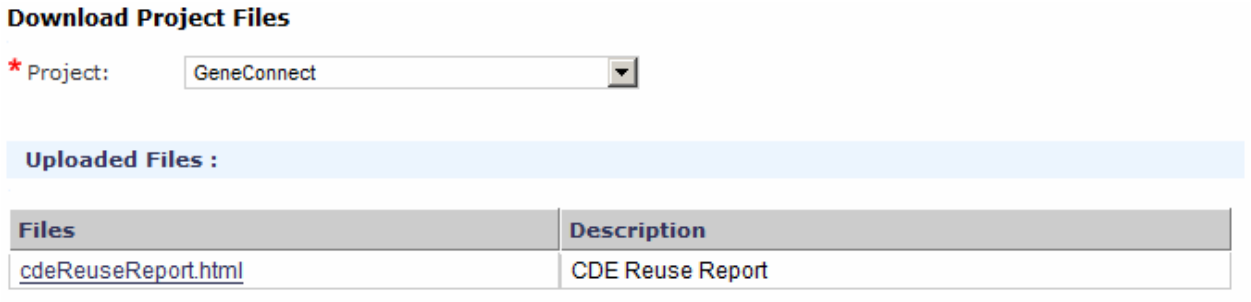


Figure 11.7: Download Project Files page, including the Uploaded Files table

3. To download a file, click on the filename link in the Files column. This will open a dialog box that will allow you to save the file.

Chapter 12: Error Messages and Problem Resolutions

This chapter reviews common error messages and lists contact information for technical support.

The following topics are covered in this chapter:

Error Messages
Contact and Support Information
Known Issues

12.1 Error Messages

When an error is encountered, the system attempts to display a message that is specific enough to allow the user to resolve the error independently. In some cases that is not possible, and the user is encouraged to contact the development team for support using the information provided in the following section.

In a future version of this document, this section will contain a summary of the most common errors that might occur. Users are encouraged to submit suggestions for improving error handling and error messages to the development team using the contact information provided in the following section.

12.2 Contact and Support Information

The following table lists the preferred method of contact for users in several situations. For specific URLs and email addresses, see the table of contact information on page 4.

Reason for Contact	Preferred Method of Contact
Information about project development	See the CRS project page on the caBIG gForge web site
Bug reports	CRS Bugzilla system (if you have an account) or Email to the development team
Technical support	Email the development team
Non-technical support (workflows and features)	Email the adopter

12.3 Known Issues

The following table lists some of the known issues in the current release of the CRS, the role(s) affected, when the issue is encountered, and what workaround (if any) is known. These issues will be fixed in future releases.

Role(s) Affected	Situation	Issue	Workaround
All Users	When viewing user profiles	When viewing user details, the fax number is displayed incorrectly. The second 3 digits of the fax number belong to the phone number and not the fax.	Do not rely on the fax number to be correct. If you need the correct fax number, contact the user by phone or email.
Admin	While performing administrative functions	Cannot delete an item from the checklist, checklist item type, checklist item grades, or submission package file list.	No known workaround.
Admin, Lead Reviewers	During a 'Request for More Information'	If you request an extra file from a reviewer that file will become a permanent member of the master submission package file list and shown for future review projects.	Admins should only request new files when it is believed all projects may need this file. Lead reviewers should request additional files offline and upload it via the Upload Project Files page.
Lead Reviewers	When the lead reviewer is initiating the review	Project level checklist items cannot be assigned to reviewers. Consequently, there is no way for a reviewer to answer them during the review.	The lead reviewer must be sure to answer ALL project level checklist items on the checklist tab of the project initialization workflow.
Lead Reviewers, Reviewers	When finishing a review	When the **Finish Review** button is clicked the last item answered/changed will not be saved.	To ensure the last answer is saved, either click the **Save** button or select any other node in the tree before clicking the **Finish Review** button.

Chapter 13: FAQs

This chapter contains answers to Frequently Asked Questions.

As of the writing of this document, the Compatibility Review System has been used in only a single compatibility review and consequently there are no FAQs. This chapter will be populated based on user feedback as it is collected.

13.1 FAQs

The table below lists answers to Frequently Asked Questions about the Compatibility Review System.

Question text? Answer goes here.

References

1. **caBIG™ Compatibility Guidelines, Revision 2.**
   https://cabig.nci.nih.gov/guidelines_documentation/caBIGCompatGuideRev2_final.pdf
2. **caBIG™ Silver Level Compatibility Review Process.**
   https://cabig.nci.nih.gov/guidelines_documentation/Silver_Review/
3. **caBIG™ Compatibility Reviews gForge site.**
   http://gforge.nci.nih.gov/projects/compat-rev/
4. **caBIG™ Silver Level Criteria gForge site.**
   http://gforge.nci.nih.gov/projects/silver-criteria/
5. **caBIG™ Guides to Mentors gForge site.**
   http://gforge.nci.nih.gov/projects/guide/
6. **Leading a Silver Level Compatibility Review*.**
   http://gforge.nci.nih.gov/frs/download.php/3440/Leading_Silver_Review_SOP_v1.004.doc
7. **Silver Level Compatibility Review Guidelines: Guidelines for Reviewing APIs*.**
   http://gforge.nci.nih.gov/frs/download.php/1672/Silver_API_Guidance_White_Paper_Final.pdf
8. **Silver Level Compatibility Checklist – Architecture*.**
   http://gforge.nci.nih.gov/docman/view.php/233/8448/api_review_checklist_2.0.doc
9. **Silver Level Compatibility Review Guidelines for Reviewing Information Models and Common Data Elements*.**
   http://gforge.nci.nih.gov/frs/download.php/3289/VCDE_Silver_Level_Criteria_Whitepaper_0.93.doc
10. **Silver Level Compatibility Checklist – VCDE*.**
    http://gforge.nci.nih.gov/docman/view.php/233/10504/Silver-Checklist_VCDE_3.101.xls
11. **Examples of interim and final presentations to the Architecture and VCDE workspaces.** Reports and presentations from previous Silver Level reviews can be found on the caBIG™ Compatibility Reviews gForge site (see reference 3).
12. **caCORE Software Development Kit (SDK).**
    http://ncicb.nci.nih.gov/NCICB/infrastructure/cacoresdk.

***** The URL given is for the latest version of the document as of the time of writing this document. See the caBIG™ Silver Level Criteria or Guides to Mentors gForge sites for the most recent version.

Acronyms and Abbreviations

Term	Definition
API	Application Programming Interface
caBIG	cancer Biomedical Informatics Grid
caCORE	cancer Common Ontologic Representation Environment
caDSR	Cancer Data Standards Repository
CDE	Common Data Element
DE	Data Element
DEC	Data Element Concept
EVS	Enterprise Vocabulary Services
ISO	International Organization for Standardization
NCI	National Cancer Institute
NCICB	National Cancer Institute Center for Bioinformatics
PV	Permissible Value
SDK	Software Development Kit
UI	User Interface
UML	Unified Modeling Language
URL	Uniform Resource Locators
VD	Value Domain
XMI	XML Metadata Interchange (http://www.omg.org/technology/documents/formal/xmi.htm)